2002 SURVEY OF RESIDENT SENTIMENTS ON TOURISM IN HAWAII

Analysis and Report

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Prepared for:

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and the
Hawaii Tourism Authority

EXECUTIVE SUMMARY

This is the third in a series of telephone surveys that Market Trends Pacific, Inc. – with assistance from John M. Knox & Associates, Inc. – has carried out for the Hawaii Tourism Authority and/or the State Department of Business, Economic Development, & Tourism. The research was initiated in 1999. The second survey was done in August 2001, but that report went unreleased because it then seemed irrelevant in the wake of the September 11 attacks and consequent temporary devastation of Hawaii's visitor industry. Therefore, this report contains results of both the 2002 and the 2001 surveys. It features results for some questions asked only in one year or the other, but it also permits tracking of answers over time to various series of similar or identical questions (a few of which had also been asked in a much earlier 1988 State survey). The 2001 sample size was 1,007 with disproportionate sampling in all four Hawaii counties. The 2002 sample was increased to 1,643 to permit additional separate samples for the eastern and western parts of the Big Island and for the three islands of Maui County (Lanai, Molokai, and Maui Island).

Special New Questions Posed in 2002

Geographical Areas Where New Tourism Activity Is Strongly Supported or Opposed: Residents of each county were given lists of areas for their respective counties. Oahu respondents strongly supported build-out of designated resort areas outside Waikiki (e.g., Ko Olina or Kuilima) but had much more mixed feelings about more tourism in Waikiki. Outside these existing resort areas, there was relatively more support for additional tourism in Ewa or the North Shore; least support for Kailua. Maui County respondents were more inclined to oppose than to support more tourism in all parts of Maui Island (and especially the Hana area), but they favored more tourism in Lanai and Molokai – and the Lanai and Molokai sub-samples agreed. Kauai residents were, overall, the least inclined to support more tourism anywhere on the island, with the possible exception of Waimea. Big Island residents were more likely to favor than to oppose more tourism everywhere on the island, but particularly for Hilo or Volcano.

Attitudes Toward Smaller-Scale Tourism Activities Outside Resort Areas: We asked residents living within a 5-minute drive of various small-scale activities – including both structural development like tourist-oriented retail complexes and also outdoor attractions – if these made life in their community more pleasant or less. For all these activities (including B&Bs/vacation rentals), only 15% to 25% said "less pleasant;" large majorities said either "more pleasant" or "no effect." This is consistent with other survey findings that visitor activity and expenditures are welcome throughout each island, even though residents still want to see large hotels remain concentrated in established resort areas.

Subjects That Have Been Covered in Repeated Surveys

General Evaluation of Tourism: In all three surveys, slight majorities said tourism has been "mostly good" for themselves and their families, with very few saying "bad" (though with large minorities feeling it has had "no effect" on them personally). From a community perspective, more than 3 out of 4 people in 2002 agreed tourism has brought more benefits than problems to their islands, even though 85% now feel their islands have become "too dependent" on tourism.

Community Problems: "Traffic" and "Cost of Housing" have headed the list of community concerns for three surveys, with a clear trend toward increasing concern over these issues. By contrast, there has been not only less concern but also declining concern about environmental issues, preservation of Native Hawaiian culture, problems between social groups, and lack of urban amenities such as parks or shopping areas.

Perceived Tourism Impacts: There has been a consistent tendency for most residents to believe tourism has a positive impact on things that are now regarded as just moderate or low community problems (e.g., job availability, urban amenities), while majorities or pluralities have said tourism has a negative impact on the high-problem topics of traffic and crime. In one of the few really marked differences between the 2001 and 2002 survey results, there was an across-the-board small to moderate decrease in percentages saying tourism had made various things "worse," with the change sometimes going into more "better" and sometimes into more "no effect" percentages, depending on the topic.

Attitudes Toward Visitor Industry Jobs: All three surveys since 1999 found strong (and to some extent growing) belief that the visitor industry offers a wide variety of jobs, and that "pride and dignity" can be found in tourism work as much as in any other. But slight majorities or substantial minorities also believed tourism jobs provide little advancement opportunity, have poor hours, and give outsiders a better crack at the best jobs. Only around 1 in 3 people in the 2001 and 2002 surveys felt that most of Hawaii's visitor industry managers now are people who grew up here.

Government Expenditures to Support/Improve the Tourism Product: Strong majorities in all surveys have supported (1) more expenditures to "create new" parks and other attractions for both residents and visitors (though there was lesser support in 2002); (2) more money to "restore and sustain" the same things (higher 2002 support for this than "new" parks, etc.); (3) more money to improve infrastructure "in tourist areas;" and (4) using lots of tourism tax revenues for <u>both</u> public improvements in tourism areas <u>and</u> (even more approval) "cleaning up the environment."

Attitudes Toward Tourism Growth: The cry for more economic diversification raises the question of whether tourism growth should continue until other economic bases are developed. Beginning in 1999, all surveys have found very few people (5% to 7%) wanting to stop tourism growth "even if that means the economy will stay the same or get worse." Far more (around 50%) favor tourism growth in the short term but see the need for long-term limits. Finally, a substantial minority (35% to 40%) has instead said tourism growth must be supported indefinitely until proven alternatives are found.

Despite this pattern of at least short-term growth support, and despite consistent majority support for "more tourism jobs," majorities have said they wish to see no more hotels on their islands and have opposed tax incentives to renovate or build new hotels. We made an attempt this year to see if people who favor more jobs but no more hotels had some particular philosophy (e.g., support for alternative lodging like cruise ships or dispersed B&B's), but answers to an open-ended question were muddy and inconclusive. We recommend the topic be explored in the future by closed-ended questions. Meanwhile, we note very mixed support for additional bed-and-breakfast or vacation rentals. A slight 2001 majority supported more residential B&B's/farm stays in their community, and a 46% 2002 plurality agreed with a differently-worded item saying more residential-area B&B's or vacation rentals would be good for Hawaii. The clearest support for B&B's both years came from Big Island residents.

Did the September 11 Tourism Aftermath Have Any Lasting Effect on Resident Attitudes? We saw little overall evidence that it did. The general pattern of responses in late 2002 was close to that observed in August 2001. When there were 2001-02 differences, many were part of a trend that could be traced back to 1999. Among jobholders, there was actually a slight post-2001 decline in the extent to which people saw their own job as depending on the strength of the visitor industry. Economists believe that economic systems tend to return to "equilibrium" following external shocks like the Sept. 11 attacks, and we now suspect that social factors – including basic values and attitudes about the visitor industry in Hawaii – behave the same way. (Similarly, however, true structural change in tourism may lead to more lasting change in attitudes and values.)

Effects on Attitudes of Economic Ties to Tourism: Perhaps contrary to expectations, all three surveys (and an even larger 1988 State resident survey) have found little relationship between personal or household tourism employment and opinions on most tourism-related policy issues. People who are personally employed in tourism, or have another household member who is, are of course more likely to report that tourism is good for them personally, and they have clearer – and very slightly more positive – attitudes about tourism jobs. However, there has been no statistically significant difference between tourism worker households and other worker households when it comes to beliefs about things like whether tourism should keep growing.

This conclusion is subject to a few qualifications: (1) Visitor industry entrepreneurs and high-level managers may indeed have different perspectives, but general population surveys are unlikely to include enough of these people to provide reliable figures for them. (2) Household income does have a moderate relationship with opinions on policy issues such as growth; higher-income people are more supportive of growth. It remains to be seen whether income is a proxy for educational factors or if those who are doing well in an economy based primarily on a certain industry will always tend to be more supportive than people doing less well, whether or not people consciously believe their jobs are “in” tourism.

Some Ways in Which Different Neighbor Islands Stood Out in the 2002 Survey

(Statewide results were heavily determined by Oahu responses, so the focus here is on Neighbor Islands)

Molokai: Consistent with official estimates, Molokai residents reported the highest unemployment rate and lowest median income in the state, and a whopping 86% (vs. 50% statewide) said job availability was a “big problem” for this island. Majorities supported “more tourism activity” (55%) and “more tourism jobs” (74%), and Molokai was the only place in 2002 where majorities still supported tax incentives to renovate or build new hotels. And yet – as in almost every other area – a majority (63%) still agreed there should be no more new hotels on the island.

Lanai: Hawaii’s least-populated and most tourism-intensive island also supported more “tourism activity” for itself (53%) but no more new hotels. Lanai residents were most likely to be tourism workers, and jobholders were the most likely in the state to say their jobs “greatly depend” on the strength of the visitor industry. With Kauai, Lanaians were most likely to report living both near large resorts and various smaller-scale tourist activities. Lanaians had the highest percentage saying tourism is “mostly good” for self/family (75%). Despite concerns a decade ago about social problems associated with the transition to tourism, Lanaians were *least* likely to say they think tourism make crime worse, and were *most* likely to think tourism jobs pay well. However, Lanaians also had the highest percentage believing the best tourism jobs go to “outsiders” (73%).

Maui Island: Maui residents had relatively greater concerns about population growth and environmental issues as community problems, and, along with Kauai, had *(a)* the greatest tendency to see tourism as negatively affecting traffic and housing costs, and *(b)* the most ambivalence about more tourism in wilderness areas. Maui had the largest minorities saying various small-scale tourism activities made life “less pleasant.”

Kauai: As noted above, Kauai residents are among the most likely to report living near both large and small tourism activities dispersed around their island; to see negative tourism effects on traffic and housing cost; and to have large minorities opposing more tourist activity in wilderness area. Also as previously noted, Kauai had the strongest pattern of opposing more “tourism activity” almost anywhere on the island.

Big Island: East Hawaii residents were particularly open to more tourism, and fielded the only (slight) majority to *dis*agree with the “no more new hotels” viewpoint. West Hawaii residents exhibited some of the Maui/Kauai growth concerns, but also some of East Hawaii’s openness to growth.

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I. METHODS AND SAMPLE CHARACTERISTICS

PURPOSE AND METHOD

Report Covers Separate 2002 and 2001 Surveys, plus Comparison with Earlier 1999 and 1988 Surveys

The Hawaii Tourism Authority (HTA) initiated regular surveys of resident attitudes about tourism in 1999 (and some questions in these surveys also repeat questions first asked in a 1988 survey sponsored by the State Dept. of Business, Economic Development & Tourism, or DBEDT). With a few changes, the 1999 HTA survey was repeated in August 2001, but the report went unreleased in the aftermath of Sept. 11, 2001. Therefore, this report incorporates major findings from both the 2002 and 2001 surveys, though with more emphasis on the latest figures. It should be noted that DBEDT actually funded the 2002 survey, though in cooperation with the HTA. A larger 2002 sample size permitted analysis of separate results for East and West Hawaii and the three islands of Maui County.

General Purposes

- Tracking over time of standard questions about attitudes toward the industry and jobs; opinions about growth; nature of problems from tourism, etc.
- Special questions that might be added in a particular year (in 2002, these included particular geographical areas where development is supported/opposed, and perceptions of smaller-scale tourism activities outside major resort areas).

Methods

- Computer-assisted telephone interviews (CATI), with data processing and analysis using SPSS 10.0.
- Questionnaires (see appendices) consisted primarily of closed-ended questions, but also include a few open-ended questions.
- Length of interview – about 30 minutes. This is a long survey, but response was fairly good in 1991 and 2001. In 2002, however, we began phoning during the political polling season and encountered many more refusals and drop-outs. Thus, the interviewing period extended much longer, into the early part of 2003.
- Sample sizes and other information for the 2001 and 2002 surveys:

	2002 SURVEY			2001 SURVEY		
Location	Sample Size	Max. Error	Polling Period	Sample Size	Max. Error	Polling Period
Statewide*	1,643	±3.7%	September 2002 to January 2003	1,007	± 2.8%	(All in August 2001)
Oahu	402	±4.9%		404	±4.9%	
Maui County	622	±5.1%		201	±6.9%	
-- Maui Island	--317	--±5.5%		N/A	N/A	
-- Molokai	--150	--±7.9%		N/A	N/A	
-- Lanai	--155	--±7.6%		N/A	N/A	
Kauai County	220	±6.6%		200	±6.9%	
Hawaii County	399	±4.9%		202	±6.9%	
-- East Hawaii**	--200	--±6.9%		N/A	N/A	
-- West Hawaii	--199	--±6.9%		N/A	N/A	

* As explained on next page, statewide results weighted to reflect area populations. The 2002 statewide error higher than 2001 because of additional weighting.
** East Hawaii defined as Laupahoehoe to Volcano phone prefixes. West Hawaii was Pauuilo through the Kohalas, Konas, and Ka`u.

DEMOGRAPHIC CHARACTERISTICS OF SAMPLE

In both 2002 and 2001, statewide results were weighted to reflect appropriate numbers for each county or island surveyed, based on Census data for population 18+ in the year 2000. That is, because Oahu accounts for the great majority of the state's adult population, Oahu results were given appropriately greater "weight" when calculating total State results.

Additionally, in 2001, we weighted individual county figures by ethnicity, to assure that Caucasian percentages matched 2000 Census figures for the 18+ population, and that remaining ethnic groups were allocated according to appropriate percentages from the Hawaii Health Surveillance Survey (since Census data were not yet available for them). Our 2002 statewide sample produced overall demographic results so consistent with previous figures (see Exhibit 1.1), that we felt ethnic weighting was not needed this year. (Note, however, that this year's small Kauai sample contained a disproportionate number of Caucasians. Therefore, in subsequent analyses, when Kauai stands out from the rest of the state, we check when possible to make sure this does not seem to be due to Caucasian attitudes alone.)

Exhibit 1.1: Demographics (State and Counties) – Multiple Years

	STATE			OAHU			MAUI COUNTY			HAWAII COUNTY			KAUAI COUNTY		
Ethnicity	2002	2001	1999	2002	2001	1999	2002	2001	1999	2002	2001	1999	2002	2001	1999
Caucasian	30%	31%	33%	26%	28%	31%	43%	43%	45%	41%	40%	36%	44%	33%	23%
Japanese	17%	17%	21%	18%	19%	24%	10%	14%	9%	15%	11%	16%	12%	11%	18%
Hawaiian/Pt Hawn	19%	17%	18%	17%	16%	17%	23%	1%	22%	25%	23%	21%	19%	21%	30%
Filipino	12%	10%	8%	14%	11%	8%	9%	10%	12%	6%	8%	9%	11%	15%	15%
Mixed (non-Hawn)	7%	7%	6%	7%	7%	5%	6%	4%	9%	7%	5%	8%	7%	18%	6%
Other	13%	16%	12%	16%	18%	13%	6%	11%	3%	5%	13%	11%	4%	1%	7%
Median HH Income	$46,902	$47,156	$44,468	$50,275	$48,783	$52,794	$40,934	$47,352	$43,181	$35,860	$45,854	$39,166	$40,581	$44,999	$46,590
50% or More of Family Income from Outside Hawaii*	15%	20%	26%	16%	21%	27%	11%	17%	20%	13%	22%	22%	14%	22%	17%
Median Age	43 yrs	46 yrs	41 yrs	42 yrs	44 yrs	40 yrs	45 yrs	46 yrs	43 yrs	49 yrs	47 yrs	45 yrs	47 yrs	48 yrs	43 yrs
Gender															
Male	44%	46%	45%	45%	46%	46%	42%	42%	38%	45%	50	43%	47%	46%	43%
Female	56%	54%	55%	55%	54%	54%	58%	58%	62%	55%	50	58%	53%	54%	56%
Average # People in HH Employed	1.78 people	1.80 people	1.80 people	1.82 people	1.79 people	1.85 people	1.74 people	1.86 people	1.83 people	1.57 people	1.72 people	1.53 people	1.79 people	1.95 people	1.68 people
Unemployment Rate	6.8%	N/A	N/A	6.7%	N/A	N/A	5.5%	N/A	N/A	6.5%	N/A	N/A	7.3%	N/A	N/A
Base:	(1,643)	(1,007)	(1,003)	(402)	(404)	(403)	(622)	(201)	(200)	(399)	(200)	(200)	(220)	(202)	(200)

* For 1999 and 2001, types of income suggested in the question included "Social Security or other federal assistance; federal jobs; stock dividends; and so forth'. In 2002, the question was reworded to remove the "assistance" components and instead asked about "stock dividends, work outside Hawaii, retirement income earned mostly from jobs outside Hawaii, and so forth." The lower 2002 figure probably reflects this change.

The 2002 survey for the first time included specific sub-samples for the sub-county areas of Maui Island, Molokai, Lanai, East Hawaii, and West Hawaii. Exhibit 1.2 also repeats weighted statewide figures for comparison purposes. The exhibit shows ways in which these various specific areas are demographically distinct:

- Maui Island and West Hawaii are disproportionately Caucasian; Lanai, more Filipino; and Molokai, heavily Hawaiian.
- Molokai, Lanai, and East Hawaii all reported fairly low household incomes; high unemployment rates (especially on Molokai); and Lanai incomes on average are derived very little on stocks or other sources outside Hawaii. All three areas also had fewer working adults per household, on average.
- Our Molokai sample was older and even more heavily female than other areas.

Exhibit 1.2: Demographics (Maui Island, Lanai, Molokai, East Hawaii, West Hawaii) – 2002 Only

	STATE	MAUI ISLAND	MOLOKAI	LANAI	EAST HAWAII	WEST HAWAII
Ethnicity	2002	2002	2002	2002	2002	2002
Caucasian	30%	45%	17%	23%	35%	49%
Japanese	17%	18%	6%	9%	20%	11%
Hawaiian/Pt Hawn	19%	17%	57%	21%	25%	25%
Filipino	12%	14%	8%	37%	7%	5%
Mixed (non-Hawn)	7%	6%	5%	8%	7%	6%
Other	13%	6%	3%	1%	7%	3%
Median HH Income	$46,902	$41,850	$32,619	$33,281	$33,500	$41,058
50%+ Family Income from Outside Hawaii	15%	11%	13%	6%	13%	13%
Median Age	43 yrs	44 yrs	50 yrs	41 yrs	49 yrs	48 yrs
Gender						
Male	44%	42%	37%	42%	45%	45%
Female	56%	58%	63%	58%	55%	55%
Average # People in HH Employed	1.78 people	1.76 people	1.44 people	1.47 people	1.47 people	1.68 people
Unemployment Rate*	6.8%	4.9%	16.3%	8.1%	8.1%	5.1%
Base:	(1,643)	(317)	(150)	(155)	(200)	(199)

* A rough estimate of unemployment rate could be calculated by dividing the average number of adults reported to be unemployed and actively seeking work (Q21) by the sum of this average plus average number in household employed (Q21). For various reasons, unemployment rates calculated by this sort of survey approach tend to be higher than official State figures, so the main value of these figures is for comparison across areas.

TOURISM WORKFORCE CONNECTIONS

This year we explored relationships between demographics (ethnicity and income) and two constructed variables indicating extent of tourism job affiliation. The first of these constructed variables simply tracked which households had at least one current tourism worker in the household, vs. households comprised strictly of non-tourism workers or households with no tourism workers at all. The second identified persons who had now or ever worked a tourism job; then, among the remainder, those reporting another household member currently working in tourism; and last, no personal or current household tourism job affiliation. We found:

- Compared to their overall proportions of the statewide sample, Hawaiians and Filipinos were somewhat more likely to report tourism job affiliations; Caucasians, less affiliation.
- Households with at least one tourism worker had only slightly lower median incomes than households comprised strictly of non-tourism workers – the $46,250 median income figure for tourism worker households was about 90% of the figure for households with non-tourism workers. However, tourism households also had more workers per household. A rough analysis (dividing median income by average number of people employed per household) therefore shows an even greater gap – the $19,030 “per-worker” figure for tourism households is only about 70% of the $26,700 figure for households with all non-tourism workers.
- A similar procedure for the other measure of “tourism job affiliation” also shows a gap in per-worker income between households with no tourism affiliation and those with some job affiliation. However that gap is not as large.

Exhibit 1.3: Degree of Tourism Job Affiliation Related to Ethnicity and Income

		NO. OF TOURISM WORKERS IN HOUSEHOLD			DEGREE OF JOB AFFILIATION WITH TOURISM		
	STATE	**At Least 1 Tourism Worker in Household**	**HH Has Workers, but None in Tourism**	**Nobody in Household Works At All**	**Respondent Now or Once Worked Tourism**	**Another HH Member Now Works Tourism**	**No HH Tourism Job Affiliation**
Ethnicity							
Caucasian	30%	26%	31%	34%	26%	23%	34%
Japanese	17%	14%	16%	26%	18%	8%	15%
Hawaiian/Pt. Hawn	19%	23%	17%	19%	21%	23%	16%
Filipino	12%	18%	12%	3%	13%	23%	12%
Mixed (non-Hawn)	7%	9%	7%	3%	8%	11%	7%
Other	13%	10%	14%	13%	14%	12%	13%
Median HH Income	$46,902	$46,250	$51,500	$39,420	$45,660	$55,490	$53,650
Average # People in HH Employed	1.78 people	2.43	1.93	0.00	1.93	2.45	1.96
Income Divided by Persons Employed	$26,350	$19,030	$26,700	N/A	$23,660	$22,650	$27,370
Base:	**(1,643)**	**(462)**	**(926)**	**(240)**	**(611)**	**(160)**	**(688)**

Exhibit 1.4 presents comparative data about tourism workforce connections from all four State-sponsored surveys since 1988. Several of these variables were constructed by combining separate survey questions, such as "Number of Tourism Workers in Household." However, please note that 2002 results for *two constructed variables used in the past (in italics below)* – relating to personal "Job Type" and "Tourism Job Affiliation" – are not strictly comparable to previous years' data, due to an error in the administration of one survey question in 2002. However, the overall pattern shows strong consistency over time for most questions. For example, the percentage of households containing visitor industry workers has remained very stable at 27% to 30% since 1988, and the percentage of respondents with current tourism jobs was 16% to 18% from 1988 through 2001.

Exhibit 1.4: Occupation and Tourism Affiliation

	2002 (N=1,643)	**2001** (N=1,007)	**1999** (N=1,003)	**1988** (N=3,904)
No. of Tourism Workers in Household				
1 or More Household Workers in Tourism	28%	29%	27%	30%
Household Has Some Workers, Not Tourism	56%	56%	58%	57%
Household Has No Workers At Present	15%	14%	15%	13%
Respondent's Current Job Type	*(2002 not comparable)*			
Tourism Job	*N/A*	16%	18%	16%
Non-Tourism Job (Private)	*61% private, including tourism*	35%	38%	31%
Non-Tourism Job (Public)	*20%*	23%	22%	17%
Not Employed	*10%*	26%	22%	35%
Respondent's Tourism Job Affiliation	*(2002 not comparable)*			
Respondent Has Present Tourism Job	*N/A*	16%	18%	16%
Respondent Had Previous Tourism Job	*37% present or previous tsm. job*	25%	25%	19%
Other Household Member in Tourism Work	*10%*	6%	5%	8%
No Respondent/Household Tourism Affiliation	*42%*	52%	52%	54%
Information Unavailable	*11%*	.1%	1%	3%
(% of Household Tourism Workers in Union)	(30%)	(21%)	(27%)	(N/A)
Respondent Experience "As Tourists"				
Stayed Hawaii Resort/Condo in Past 12 Months	N/A	50%	55%	1988:51% 1993:54%
Vacationed Outside Hawaii in Past 12 Months	N/A	61%	57%	1988: 48% 1993: 63%

With the exception of Molokai and East Hawaii, Neighbor Island respondents were much more likely than those on Oahu to report someone in the household was a tourism worker in 2002. Nearly half the Lanai households had at least one tourism worker.

And all Neighbor Island respondents (even including Molokai and East Hawaii) were slightly or significantly more likely than Oahu residents to say they currently or had once worked in tourism jobs. Lanai again had the highest proportion – about 5 in 8 adult respondents.

Exhibit 1.5: Degree of Tourism Job Affiliation by Geographical Area

	STATE	**OAHU**	**MAUI COUNTY**	***Maui Island***	***Molokai***	***Lanai***	**KAUAI**	**HAWAII COUNTY**	***East Hawaii***	***West Hawaii***
No. of Tourism Workers in Household										
1+ in Tourism	28%	26%	39%	*40%*	*21%*	*46%*	39%	28%	*17%*	*40%*
Workers, None Tourism	57%	60%	48%	*48%*	*57%*	*37%*	46%	53%	*61%*	*44%*
No Workers in HH	15%	14%	13%	*12%*	*22%*	*17%*	15%	19%	*22%*	*16%*
Base:*	**(1,628)**	**(400)**	**(602)**	***(306)***	***(150)***	***(154)***	**(216)**	**(395)**	***(196)***	***(199)***
Degree of Job Affiliation with Tourism										
Respondent Now or Once Worked in Tourism	42%	38%	57%	*57%*	*48%*	*64%*	56%	48%	*42%*	*55%*
No Respondent History, but Another HH Member Now Works Tourism	11%	12%	7%	*8%*	*7%*	*6%*	9%	10%	*8%*	*13%*
No HH Tourism Job Affiliation	47%	51%	35%	*35%*	*46%*	*35%*	35%	41%	*51%*	*31%*
Base:*	**(1,460)**	**(360)**	**(567)**	***(291)***	***(120)***	***(136)***	**(194)**	**(331)**	***(159)***	***(173)***

* Bases in this exhibit delete cases for which no information was available to manufacture these constructed variables. Therefore, State percentages differ slightly from those in the 2002 column of Exhibit 1.4, where the base included cases with no known values.

II. NEW QUESTIONS ADDED TO THE 2002 SURVEY

This part of the report focuses on major topic areas covered in the 2002 survey that had not previously been addressed in this form:

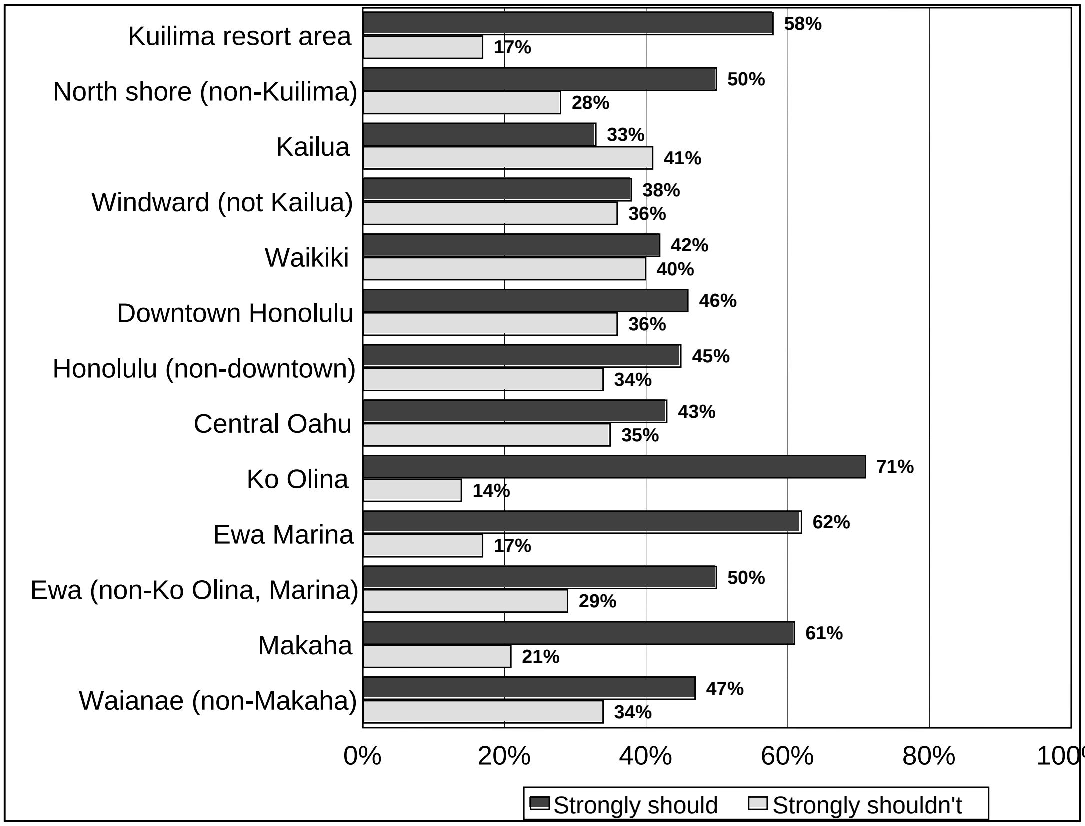
- *Identification of specific geographical areas where people reported strong feelings about whether to permit "significantly more tourism activity."*
- *Questions related to effects of small-scale tourism activities found outside major resort areas.*

SPECIFIC PLACES THAT RESIDENTS STRONGLY FEEL SHOULD OR SHOULD NOT HAVE MORE TOURISM ACTIVITY

OAHU

In 2001, we asked some open-ended questions about where residents would prefer to see or not see more tourism growth. Results to that question are produced in Part IV, but they were somewhat non-conclusive. So in 2002, we asked residents of each county to respond to a list of place names for that county: "For each one, please tell me if you have any really strong feeling that this place either should or should not have significantly more tourism activity." ("Activity" was purposely left undefined, as there was not time to ask separate questions about accommodations, attractions, retail, etc. It is reasonable to assume that respondents probably thought first in terms of additional visitor rooms.) Oahu results are on this page, with results from other counties on following pages.

Exhibit 2.1. Oahu response – "Strong feelings" that places "should or should not have significantly more tourism activity"



N=402

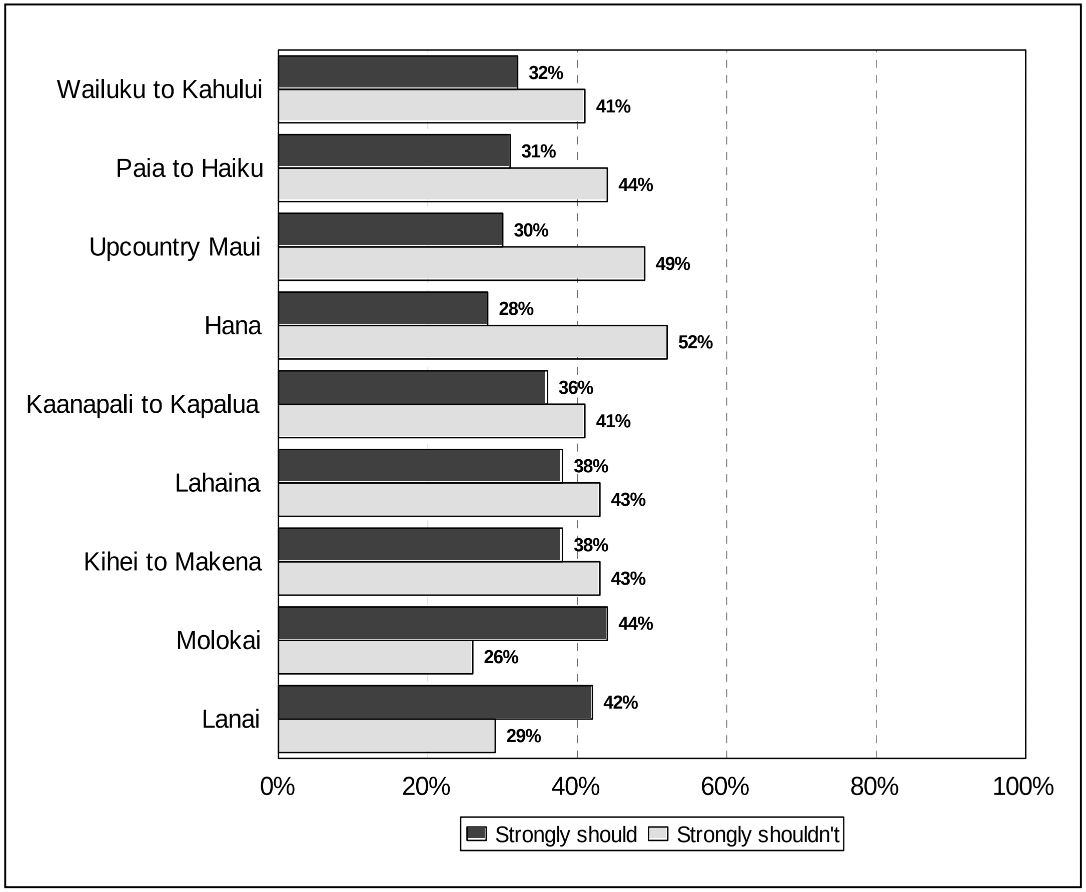
- The strongest support for "more tourism activity" was for established resort areas <u>outside</u> Waikiki, such as Ko Olina. Residents were much more ambivalent about adding more tourism development to Waikiki itself.

- Kailua was the only place where more Oahu residents strongly opposed than strongly supported more tourism. There was, however, almost as much opposition as support for "the rest of Windward Oahu."

- In other non-resort parts of Oahu, majorities or pluralities supported more tourism, but there were usually still significant minorities opposed. Nevertheless, two areas where opposition was quite small compared to support were the "rest of Ewa" (outside Ko Olina or Ewa Marina" and the "rest of North Shore" (outside Kuilima). It is important to note we do not have reliable sub-samples from the Ewa or the North Shore communities themselves.

MAUI COUNTY

Exhibit 2.2. Maui County response – "Strong feelings" that places "should or should not have significantly more tourism activity"



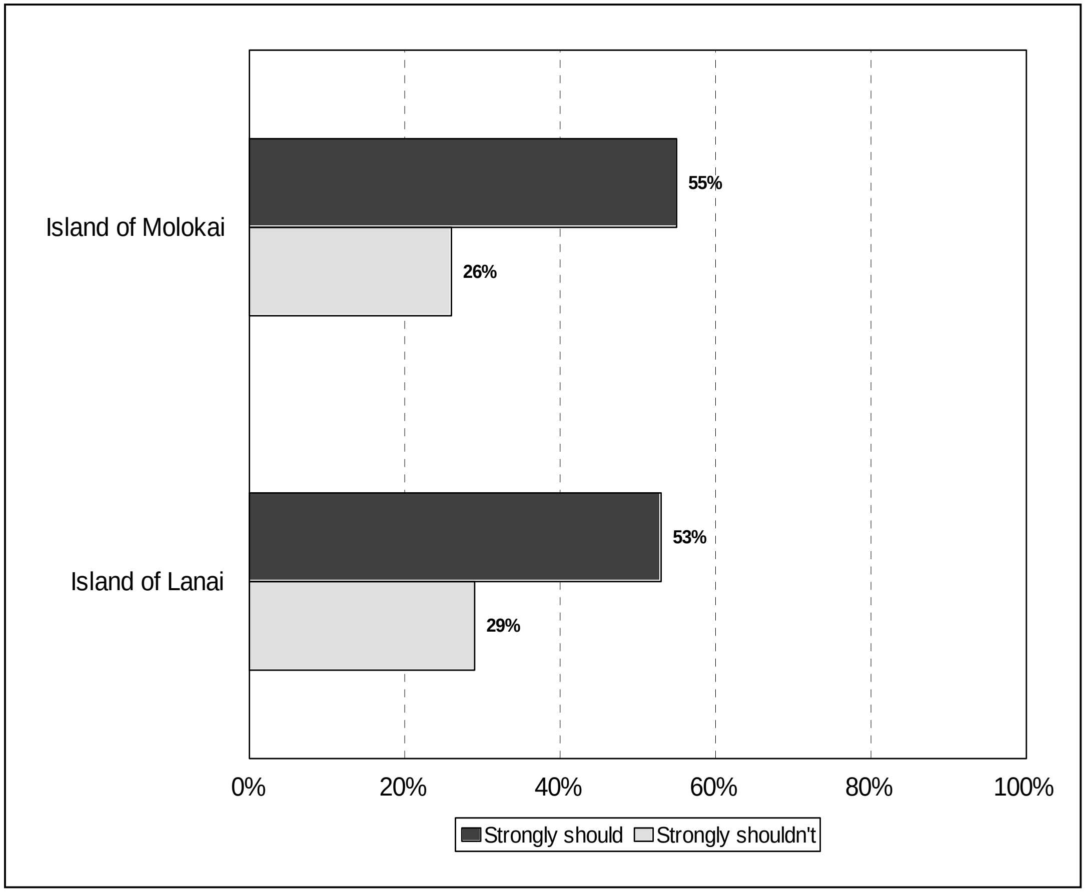
N = 622 (weighted results)

- Maui County residents were more likely to oppose than to favor more tourism activity on all parts of Maui Island, though the level of opposition was usually not as great as on Kauai. There was particularly strong opposition for Hana and other parts outside established West Maui resort areas.

- However, Maui County residents were more supportive of additional tourism activity for Molokai and Lanai. Plurality support clearly exceeded opposition for these areas. (See additional analysis on next page.)

MOLOKAI-LANAI

Exhibit 2.3. Molokai and Lanai responses about more tourism activity on their own respective islands

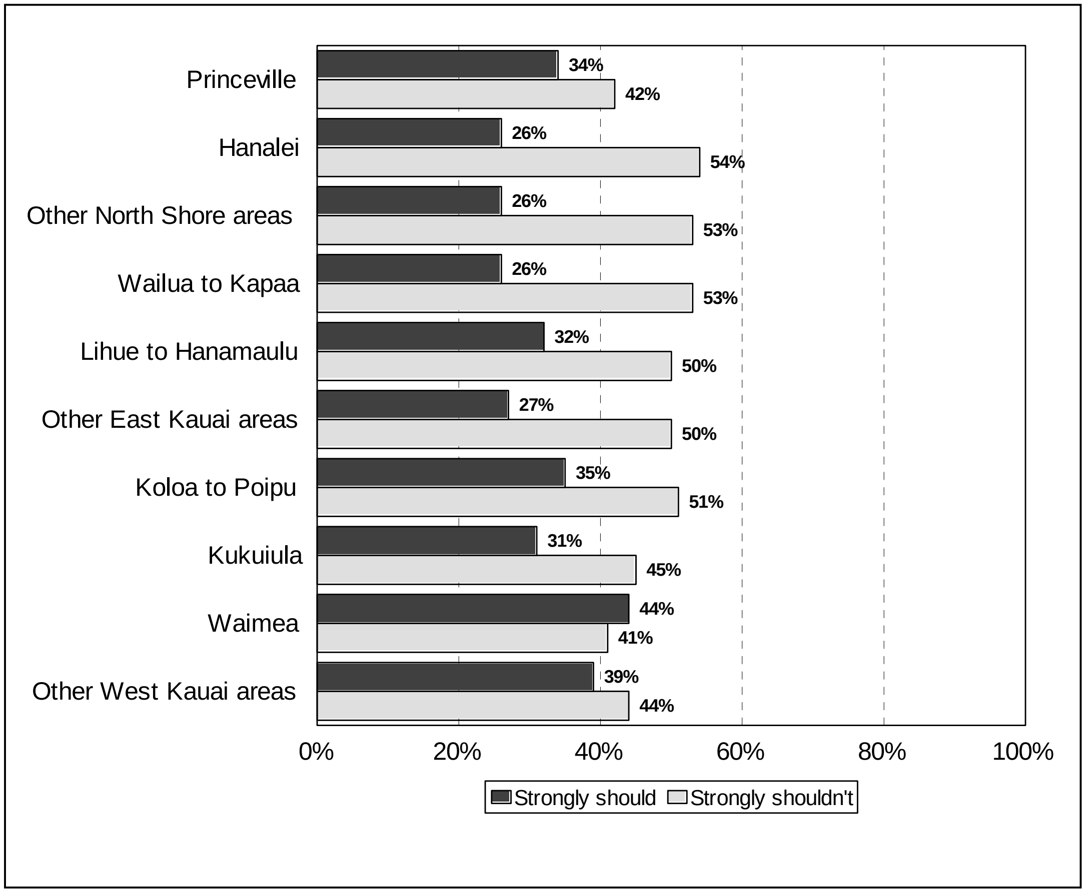


N = 150 for Molokai, 155 for Lanai.

- While Maui County residents as a whole supported more tourism on Lanai and Molokai, did residents of those islands feel the same way? Exhibit 2.3 shows they did – and to an even greater extent than residents of other islands in the same county (although most of the differences do not quite reach statistical significance due to sample size).
- Majorities on each of these two islands said they strongly felt there should be more tourism activities on their own islands, and opposition levels were about the same as on Maui Island.

KAUAI COUNTY

Exhibit 2.4. Kauai County response – "Strong feelings" that places "should or should not have significantly more tourism activity"



N = 220

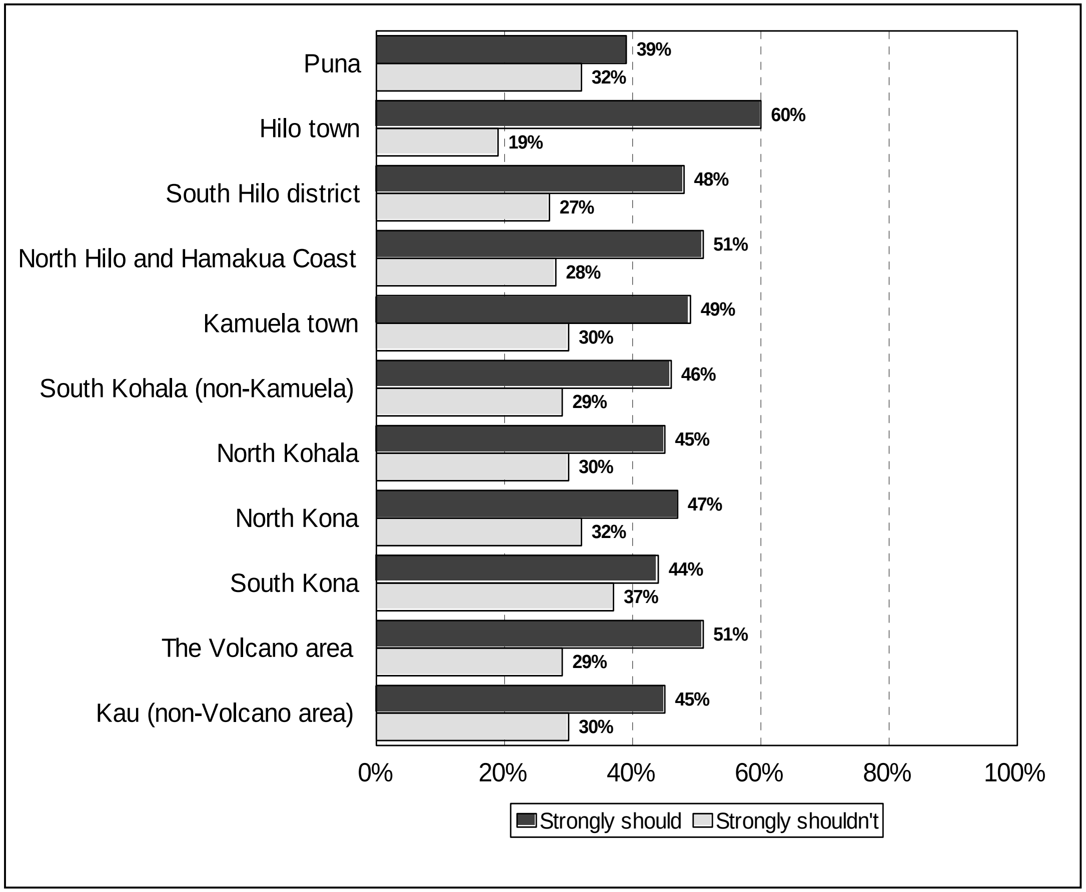
- Kauai was the most opposed of all counties to further tourism activities virtually anywhere in the island. With one exception, majorities or pluralities said they felt there should be no tourism growth for all parts of the island named.

- The exception was Waimea, where a 44% plurality in favor of more tourism edged out the 40% opposed.

- Because Kauai stood out in the extent of its opposition to more tourism activities, and because the 2002 Kauai sample was disproportionately Caucasians, we checked to make sure this was not the reason. It was not. Caucasian and non-Caucasian responses were very similar.

HAWAII COUNTY

Exhibit 2.5. Hawaii County response – "Strong feelings" that places "should or should not have significantly more tourism activity"



N = 399 (weighted results)

- Big Island residents were more likely to favor tourism growth than to oppose it for every part of the island. However, support was particularly apparent for Hilo and the surrounding East Hawaii area, especially Volcano.

- Analysis of differences between East Hawaii and West Hawaii responses showed that East Hawaii residents were consistently more likely to favor more tourism growth in all parts of the island than were West Hawaii residents. However, the differences were generally not quite large enough to attain statistical significance.

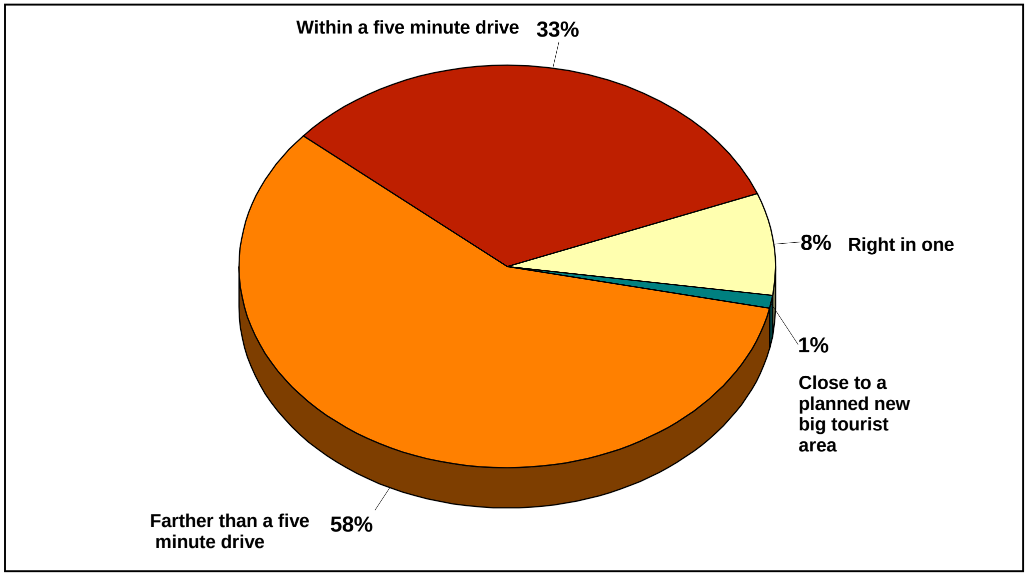
- In West Hawaii, support for more tourism activity fell slightly below opposition for two areas: Puna (33% favor, 34% opposed) and South Kona (40% favor, 41% opposed).

EVALUATIONS OF SMALL-SCALE TOURISM ACTIVITIES OUTSIDE MAJOR RESORT/ATTRACTION AREAS

IDENTIFYING RESIDENTS BY LOCATION

This year's survey had a new series of questions about whether small-scale tourism activities outside large resorts or other major tourism attractions enhance or detract from nearby residents' quality of life. The initial question below was simply used to screen out residents who actually live in major resort areas – and to distinguish between people who live near them vs. those who live farther.

Exhibit 2.6. How close do you live to "nearest really large resort area or tourist attraction? (Q6)



N = 1,643

Results by County

	OAHU	MAUI	KAUAI	HAWAII
Right in one*	**7%**	**14%**	**11%**	**7%**
Within 5-minute drive	**36%**	**25%**	**36%**	**21%**
Farther than a 5-minute drive	**56%**	**61%**	**53%**	**72%**
Close to planned new big tourist area	**2%**	**1%**	**1%**	**0%**

*These respondents were not asked follow-up questions on the next several pages.

- About 8% of residents statewide believed they live "right in" a major resort area or tourist attraction, and so were not asked follow-up questions discussed on the next few pages.

- Nearly 60% of Hawaii residents believed they live at least a five-minute drive away from the nearest large tourism area.

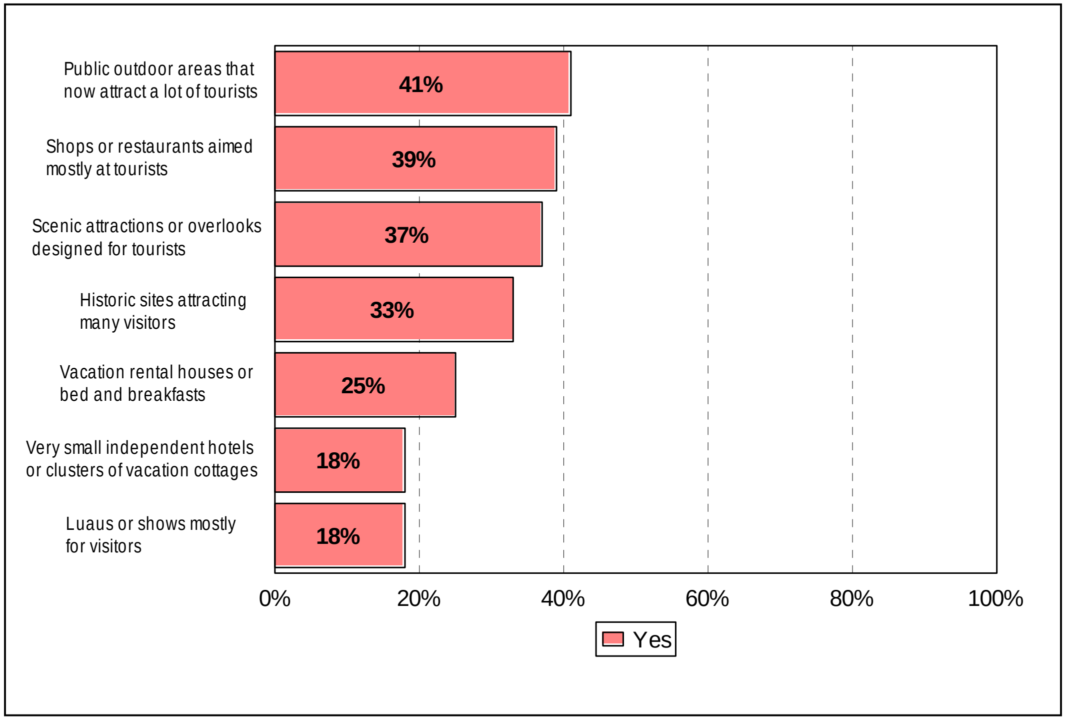
- On a county basis, Maui and Kauai residents were most likely to say they lived in or near major tourist areas. However, even more detailed results show Lanai residents were most likely to say they live right in (33.5%) or within a five-minute drive (42%) of a major tourism area.

- People most likely to say they live farther away from major tourism areas were those in East Hawaii (78%) and Molokai (71%). At least by this measure, these are the "least tourism-impacted" parts of Hawaii.

PERCEPTIONS OF WHETHER RESIDENTS LIVE NEAR VARIOUS SMALL-SCALE TOURISM ACTIVITIES

This series of questions measures perceptions or awareness of smaller-scale tourism activities near residents' homes. Those who said they believed they lived near a particular activity were asked a follow-up evaluation question for that item (see following page).

Exhibit 2.7. "Are any of the following smaller tourist activities within a 5-minute drive of your house?" (Q7)



N = 1,518 (weighted statewide figure)

- Substantial minorities of residents living outside large tourism areas believed they do live nearby smaller tourism activities.

- The type of activity that people most often believed they live near was "Public outdoor areas – like beach parks or hiking trails – that now attract lots of tourists." Almost as many believed they live near "Shops or restaurants aimed mostly at tourists."

- Smaller proportions believed they live near bed-and-breakfasts (about 1 in 4) or near either luaus or small independent hotels or clustered vacation cottages (less than 1 in 5).

TOTAL NUMBERS OF SMALLER TOURISM ACTIVITIES

We counted up the number of smaller-scale activities that each respondent believed was within a 5-minute drive of his/her house. Exhibit 2.8 below shows that the greatest numbers were reported on Lanai, followed by Kauai. Additional analysis showed that this was in part because people living near *large* tourism areas were statistically more likely to say they also lived near *small* ones, and Lanai and Kauai residents tended to report both – hence could be called the "most tourism-impacted" parts of Hawaii, at least in terms of daily proximity.

East Hawaii, Molokai, and Oahu residents reported the fewest average numbers of nearby small-scale tourism activities. (It should be noted, of course, that these are *perceived* activities – people may be unaware of some activities, or overestimate the true numbers near their houses.)

Exhibit 2.8. Numbers of Perceived Smaller Tourism Activities by Geographical Areas (Q7)

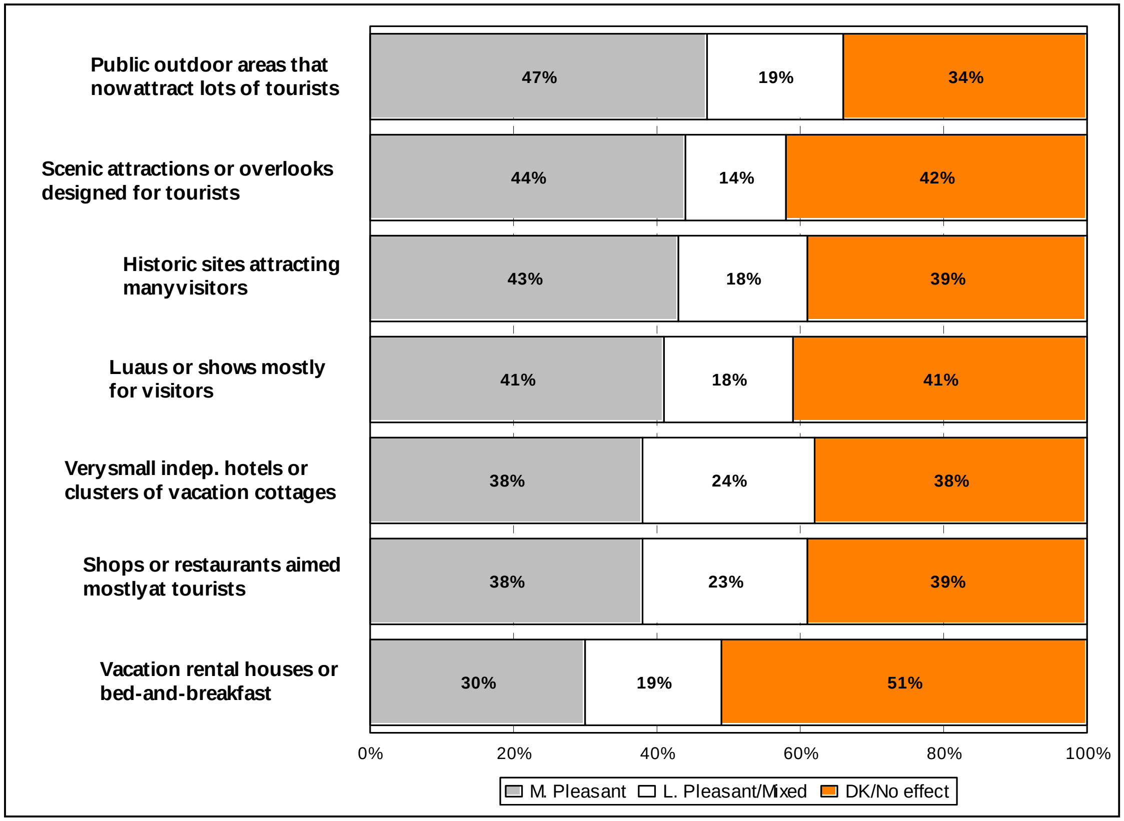
	STATE	**OAHU**	**MAUI COUNTY**	***Maui Island***	***Molokai***	***Lanai***	**KAUAI**	**HAWAII COUNTY**	***East Hawaii***	***West Hawaii***
No. of Reported Nearby Small-Scale Tourism Activities										
None	28%	27%	31%	*31%*	*30%*	*11%*	22%	31%	*35%*	*26%*
1 or 2	35%	38%	25%	*25%*	*39%*	*21%*	24%	32%	*37%*	*25%*
3 to 7	37%	35%	44%	*44%*	*31%*	*68%*	56%	37%	*28%*	*49%*
Avg. Number	2.11	2.02	2.34	*2.35*	*1.88*	*3.44*	3.03	2.12	*1.69*	*2.62*
Base:*	**(1,518)**	**(375)**	**(537)**	***(275)***	***(135)***	***(103)***	**(197)**	**(320)**	***(185)***	***(185)***

* Base is smaller than total samples because people living "right in" large resorts or tourist attractions were not asked these questions.

EVALUATIONS BY RESIDENTS LIVING NEAR SMALL-SCALE TOURISM ACTIVITIES

Each person saying they lived near a particular small-scale tourism activity was then asked if that activity "made your area more pleasant or less pleasant to live in?" If the person answered "Mixed" or "No effect," we recorded those answers separately. Statewide results are below, with some area-specific results on the following page. Our exhibits combined answers of "Less pleasant" and "Mixed" because we assume "Mixed" conveys at least some unpleasant consequences. (For most items, people were more likely to say "Mixed" than "Less pleasant.") We also combine "No effect" and "Don't know," though the great preponderance of these were "No effect."

Exhibit 2.9. Has this activity made your area more less pleasant to live in? (Q8)



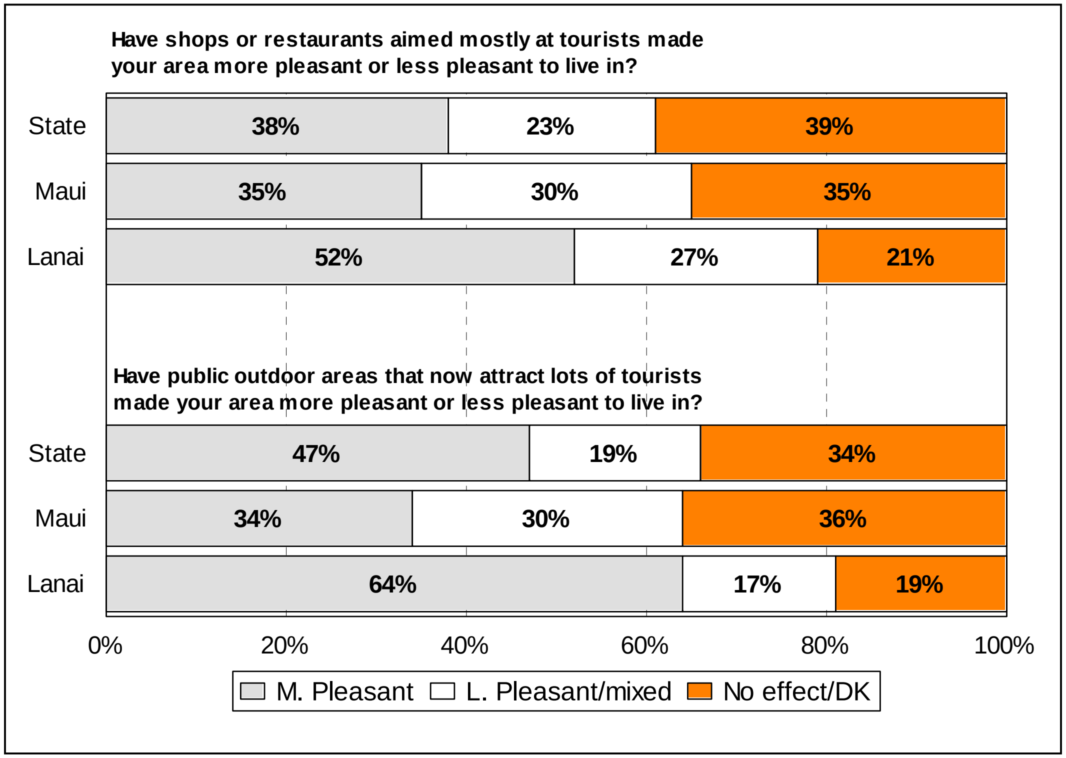
N's vary depending on number saying they lived near each activity.

- Only 15% to 25% of respondents living near any of these small tourism activities said they had any negative consequences for quality of life. (However, it remains to be seen if people living even closer might have higher rates of negative response.)
- This means 75% to 85% said either "more pleasant" or "no effect." In general, people were a little more likely to say "more pleasant" than "no effect," with a clearer tilt toward "more pleasant" for natural or historic sites attracting tourists.
- "Vacation rental houses or bed and break-fasts" were least likely to win a "more pleasant" answer, but that did not translate into higher rates of unpleasant effects. (Again, people living in the same block as a vacation rental might well answer differently.)

Geographical Differences by Area of Residence

There was a fairly consistent pattern as to which island residents were more likely to say small-scale tourism activities made life "more pleasant" vs. "less pleasant" or "mixed effect." Two examples are shown below, one for outdoor tourism activities and one for structural development attracting tourists. We show results for the islands with particularly notable differences from statewide average results.

Exhibit 2.10. Examples of geographical differences in response to Q8



- Lanai residents were generally much more likely to say that small-scale tourism activities made life "more pleasant." (The only item for which this was untrue was "scenic attractions designed for tourists;" Lanai's 49% "more pleasant" figure was second to Molokai's 61% mark.)

- Though the difference was less dramatic, Maui Island residents were a little more likely than others to say nearby small tourism attractions made life "less pleasant" or "mixed." This was just a matter of larger minorities on Maui; most people still said "pleasant" or "no effect."

- Because of small sample sizes, most of these differences did not attain statistical significance, though the Lanai figures were occasionally significantly greater than those for a few other places.

- Detailed results show some tendency for Filipinos and Hawaiians to be more likely to find problems from small-scale tourism. For example, 25% of both groups said B&B's/rental cottages made life "less pleasant" or "mixed," vs. 18% for Caucasians, 14% for Japanese, and 13% for Others.

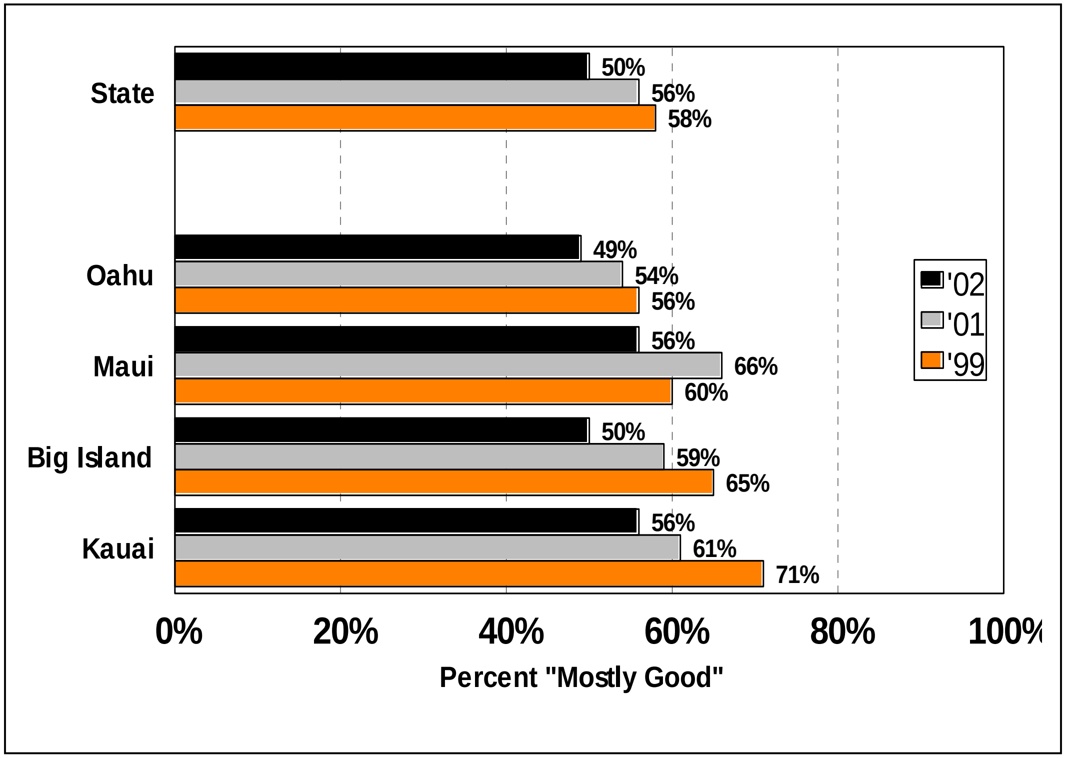
III. QUESTIONS REPEATED IN 2002 FROM PREVIOUS SURVEYS

(These are either individual questions or series of questions. In some of the series, there were slight changes in 2002 – an item dropped, an item added, and/or an extra question inserted to probe for more in-depth information. But for the most part, these questions are comparable over time.)

THE EFFECTS OF TOURISM ON SELF, FAMILY, AND COMMUNITY

IMPACT ON SELF AND FAMILY

Exhibit 3.1: Has tourism been mostly good or bad or you and your family? (Q13, by County)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

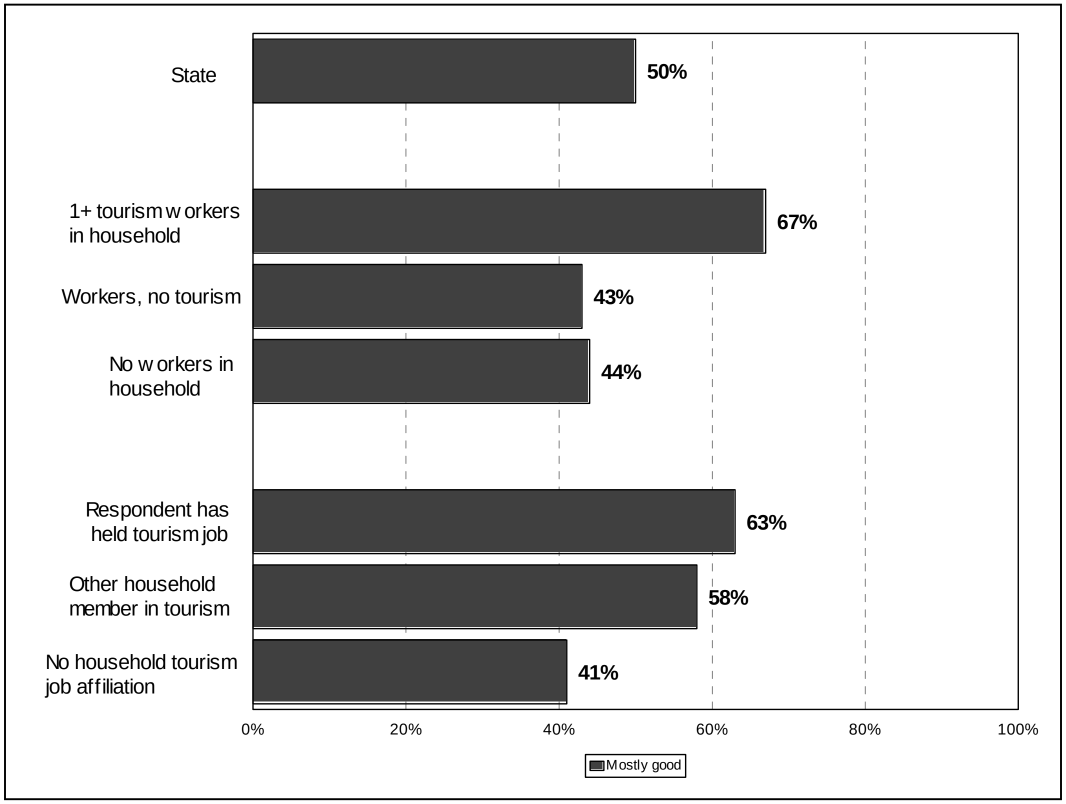
- As of 2002, about 50% of residents statewide believed that tourism has been "mostly good" for themselves and for their families. (See Exhibit 3.1) [Note: Most of those giving other answers said "no effect." Only around 5% actually said "bad."]

- Exhibit 3.1 also shows the percentage saying "mostly good" dropped in all counties in 2002. [The shift tended to be to more "no effect's" or "mixed effects," not more "bad's," and the difference was generally not large enough to be statistically significant.]

- Exhibit 3.1 also shows that Maui and Kauai County residents were a little more likely to say "mostly good."

- Detailed results show Lanai residents were by far the most likely to say "mostly good" in 2002 – 75%.

Exhibit 3.2. Has tourism been mostly good or bad or you and your family? (By Job Affiliation Measures)



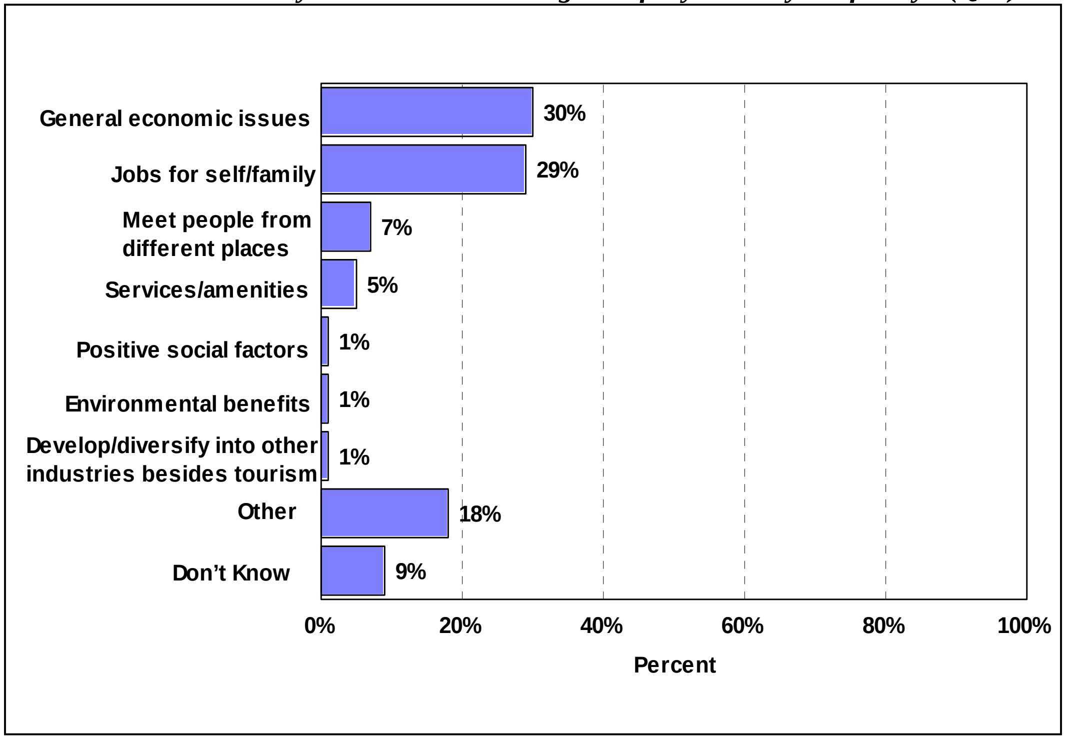
N = 1,643

- Not surprisingly, those employed in tourism are much more likely to believe tourism has been "mostly good" for themselves and their families. Respondents who said their household contained at least one current tourism worker were about half again as likely to say "good" as those with no tourism workers or no workers at all

- Also, workers with a personal history of tourism work were a bit more likely than those who just had another household member in tourism to say "good," though this difference was not statistically significant. However, both these groups were significantly more likely to say "good" than respondents with no tourism job affiliation at all.

- The groups less likely to say "good" were not found to be more likely to say "bad." Instead, they were just more likely to say "no effect."

Exhibit 3.3: In what ways has tourism been "good" for you and your family? (Q14)



Reduced N. Figures represent only those who said "tourism has been mostly good".

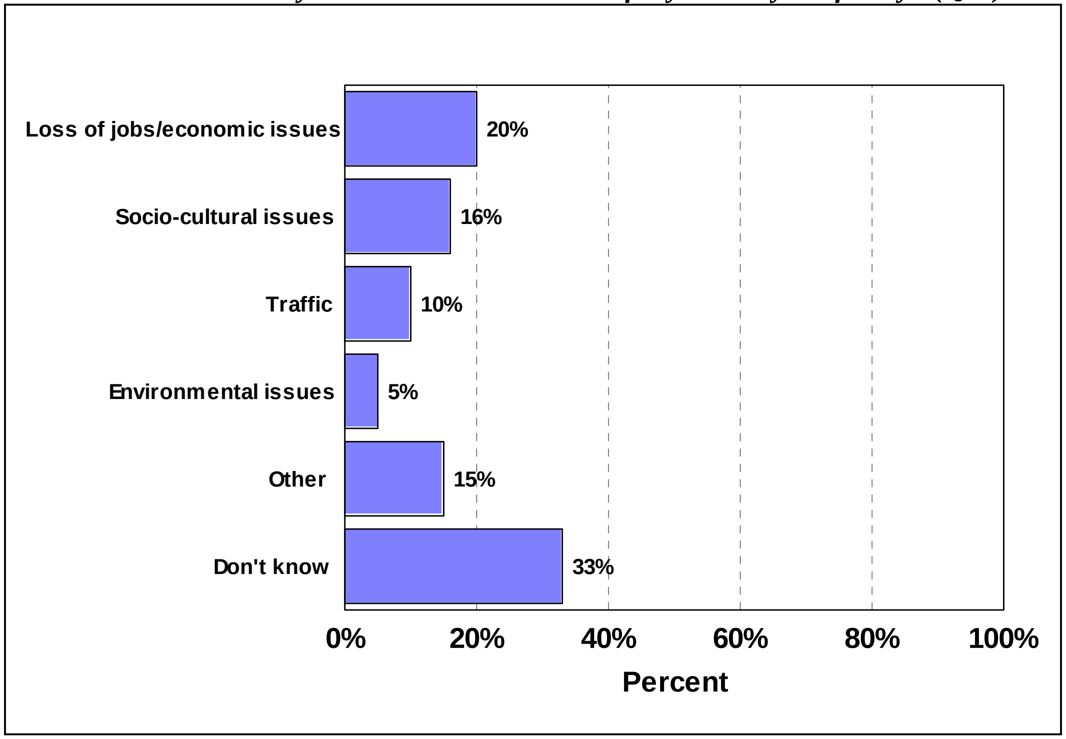
- Residents who said tourism has been "mostly good" or "mixed good and bad" were asked in what ways tourism had been good. The most frequent answer was because of "general economic issues" (30%). Statewide, twenty-nine percent credited "jobs for self/family" while seven percent cited "meeting people from different places." Other top reasons included: "amenities and services" (5%), "positive social factors" (1%), "environmental benefits" (1%), and "developing/diversifying into other industries besides tourism" (1%). (See Exhibit 3.3)

- Some examples of the "general economic issues" idea:

  - *"Generally speaking, the money that tourists bring into the economy makes it better for Hawaii."*

  - "*Tourists help because by coming here, the economy becomes better."*

Exhibit 3.4: In what ways has tourism been "bad" for you and your family? (Q15)



Reduced N. Figures represent those who said "tourism is mostly bad".

- Those few residents who said tourism has been "mostly bad" (or "mixed good and bad") cited loss of jobs and other economic issues as a reason. Other reasons include social and cultural differences and traffic. (See Exhibit 3.4)

- Some examples of the "loss of jobs/economic issues" idea:

  - *"Tourism raises the cost of living."*

  - *"When prices go up because of tourists, prices also go up for local people."*

- Some examples of the socio-cultural issues idea:

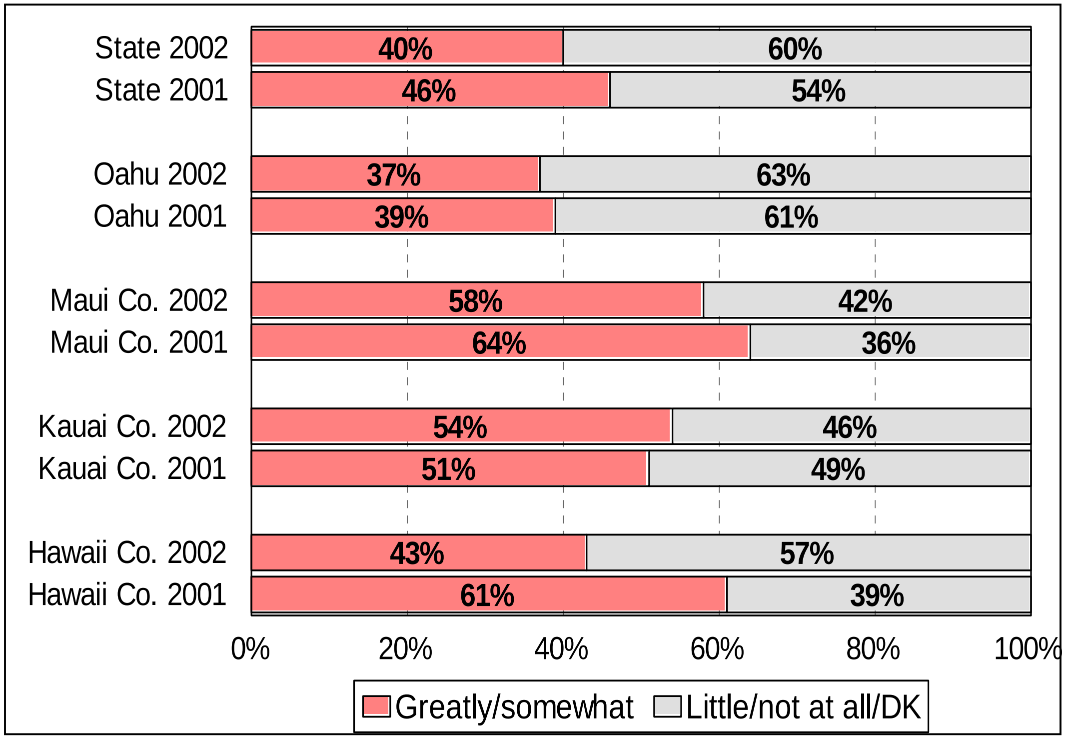
  - *"Some tourists have bad attitudes, which isn't to nice to see."*

  - *"Crime. Crime has increased because of tourism."*

PERCEPTION OF EXTENT THAT ONE'S OWN JOB DEPENDS ON STRENGTH OF THE VISITOR INDUSTRY

A question of some interest is to what extent the post-9/11 tourism crash and subsequent general economic malaise in Hawaii may have had on perceptions that one's own individual employment depends on the strength of the visitor industry. In fact, this question was posed (though only to respondents saying they were actually employed) both in August 2001 and again in late 2002.

Exhibit 3.5. "How much would you say your job depends on the strength of the visitor industry?" (Q26)

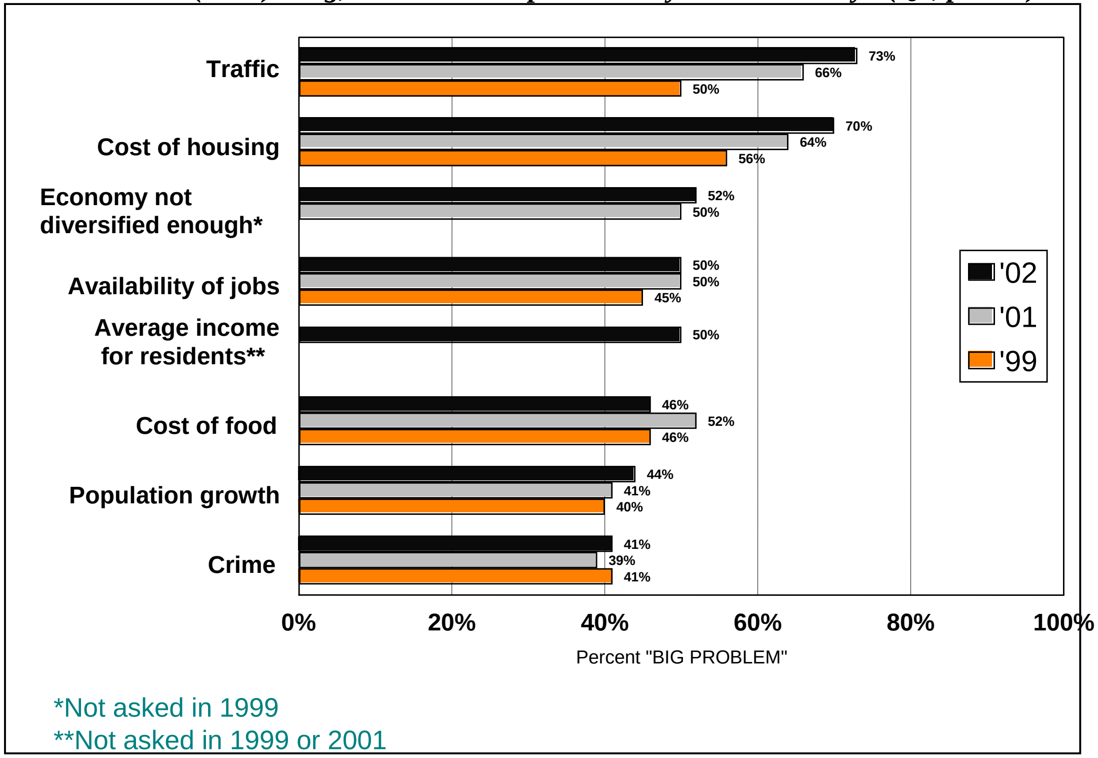


Reduced N. Question asked only to those who said they were personally employed

- Perhaps counter to expectations, the 2002 statewide belief that one's job is dependent on tourism has actually declined slightly from its pre-Sept. 11 statewide level. However, the statewide drop fell just short of statistical significance.
- The large decline on the Big Island, however, did reach statistical significance, and helped bring down the statewide levels.
- The general pattern for both years was that Oahu jobholders were least likely to feel their own jobs depend much on tourism, but majorities in Maui and Kauai Counties did feel their jobs were either "greatly" or "somewhat" dependent on the strength of the visitor industry.
- More detailed 2002 figures show Lanai residents felt the strongest job dependence on tourism. Some 53% felt their jobs were "greatly" dependent on tourism, and another 16% said "somewhat." Interestingly, Molokai jobholders – with 44% saying either "greatly" or "somewhat" – gave answers not too different from statewide averages.
- East Hawaii jobholders tied with Oahu for the lowest 2001 levels of perceived dependency – just 37% "greatly" or "somewhat."

MAJOR ISSUES AND PROBLEMS IN COMMUNITY

Exhibit 3.6: Is (issue) a big, small or not a problem in your community? (Q1, partial)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

See next page for a continuation of this exhibit, showing additional questions that generated lower levels of concern.

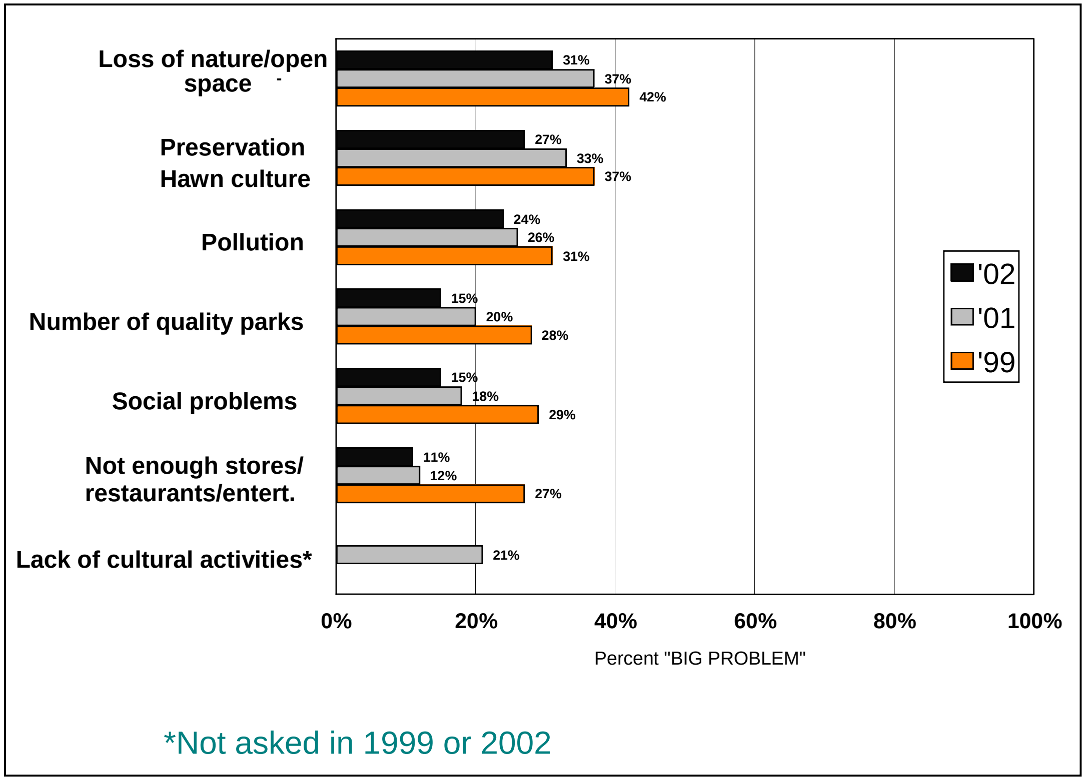
- Traffic, cost of housing, and lack of sufficient economic diversification were the top issues statewide in both 2001 and 2002. (See Exhibit 3.6) It should be noted these figures are based on responses to a list, rather than an open-ended question.

- An examination of individual county results showed that complaints about traffic increased in all counties from 2001 to 2002, though the increased concern about housing was mostly due to a jump in Oahu figures. Hawaii County had slightly lower levels of concern about these issues both years. The 2002 sub-samples showed concern over traffic was negligible in Lanai and Molokai, and lower than average in East Hawaii, and all three also had less concern than other places over housing costs.

- Other economic issues (job availability and cost of food/clothing) were slightly ahead of social issues (population growth and crime.) The differences are not necessarily statistically significant, but have remained fairly consistent over time. On an island basis, though, job availability was by far the top Molokai issue (86% "big problem").

- The greatest 2002 concern over rapid population growth was expressed on Maui Island (58% "big problem") and the least on Lanai and Molokai (about 15% each saying "big problem").

Exhibit 3.6 (continued). Is (issue) a big, small or not a problem in your community? (Q1, partial)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

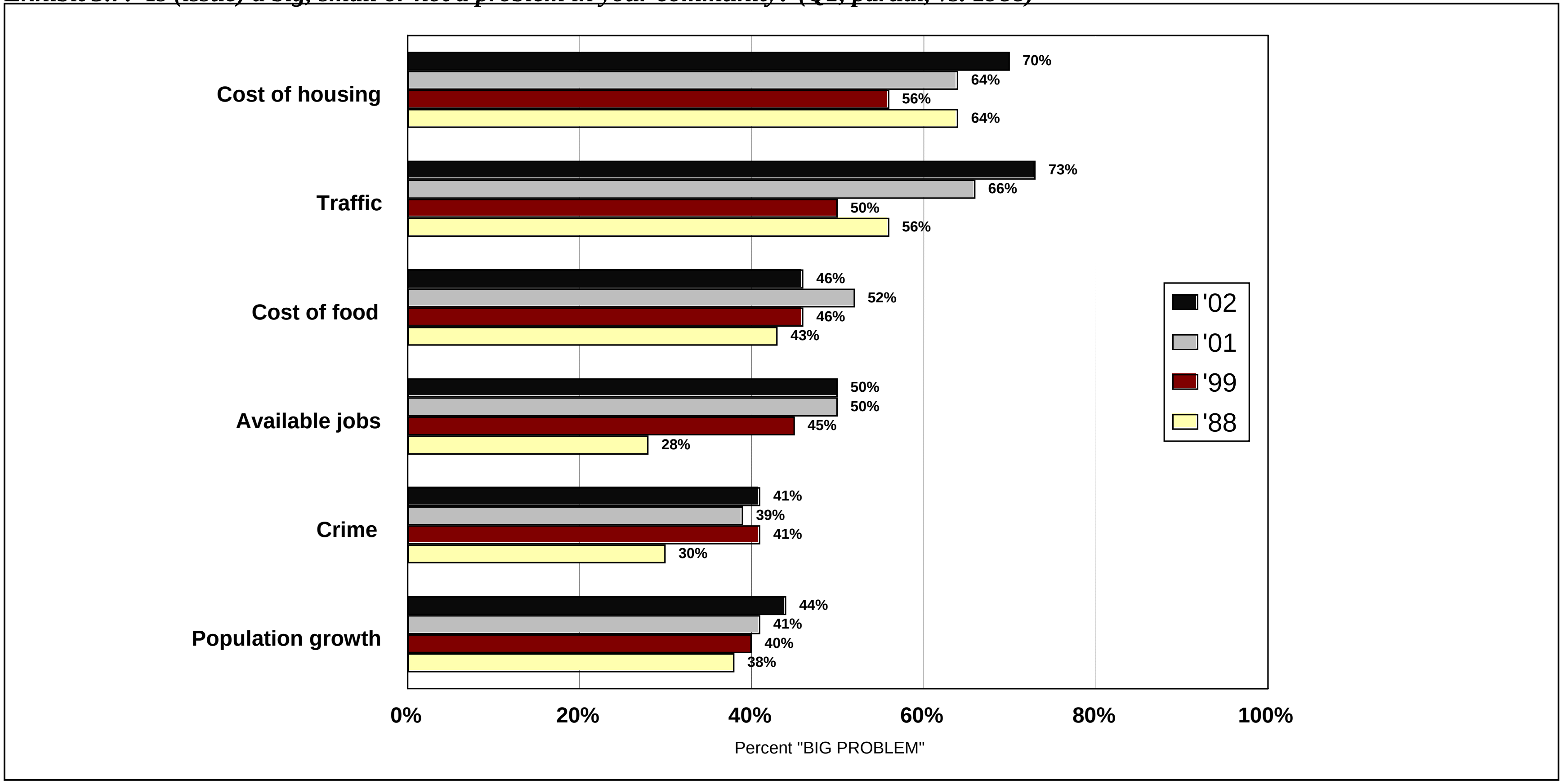
- Far less frequently cited as community problems were environmental issues, lack of urban amenities, preservation of Native Hawaiian culture, and "social problems between people with different backgrounds." (See Exhibit 3.6 continuation) In fact, expressed concern about all of these has been steadily dropping since 1999.

- Perhaps consistent with their focus on population growth, Maui Island residents reported the relatively highest level of concern about environmental issues in 2002, while Molokai and Lanai residents were least concerned. For example, 41% of Maui Island residents said "loss of nature and open space" was a big problem, while just 6% of the Lanai sample felt the same.

- A similar if slightly less dramatic difference was observed for concern about "preservation of Native Hawaii culture." On Maui Island, 34% said this was a big problem – vs. 21% on Molokai and 17% on Lanai. The Maui vs. Lanai gap was large enough to attain statistical significance.

Some of these items had also been included in the 1988 survey. Generally, recent survey results show even higher levels of community concern for various issues than was the case in 1988. This is particularly true for crime and for job availability, though 1988 was of course a “boom” year in Hawaii’s economy and people were far less anxious about employment then. (See Exhibit 3.7) However, the cost of housing was a frequently expressed big community problem back in 1988 as well.

Exhibit 3.7: Is (issue) a big, small or not a problem in your community? (Q1, partial, vs. 1988)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999; 3,904 for 1988

PERCEIVED COMMUNITY IMPACTS OF TOURISM

- Residents were most likely to say tourism has a negative impact ("makes it worse") on several things they consider "big problem(s)" or moderate problems in their community – particularly traffic (54% negative in 2002), crime (41%) and housing costs (35%). (See Exhibits 3.6 vs. 3.8) Detailed results show Kauai and Maui Island had even higher negative impact ratings for traffic (70%+) and housing costs (50%+), but Lanai had a very low figure (14%) for crime.

- However, tourism was perceived to have a mostly positive impact on economic issues such as availability of jobs 80% positive in 2002), resident amenities like shopping (70%), and average resident income (54%). These things had been judged to be moderate or less important community problems. (Again, see Exhibits 3.6 vs. 3.8) Tourism also received good marks for effects on "overall" quality of life and standard of living.

- In the last several years, there has been an increasing tendency for the overall pattern of responses to grow much closer to their 1988 figures, following a time in 1999 when there were clear differences from 1988. (See Exhibit 3.8) That may be because Hawaii's economy was better in August 2001 and again in late 2002, i.e. getting closer to the "good times" of 1988. For that reason, it is hard to say whether changes between the 2001 and 2002 surveys have anything to do with the post-Sept. 11 tourism downtown, or whether this was a trend already in place. However, there was a clear *small* overall tendency for more "Better" perceptions in 2002 than 2001, and a somewhat *larger* decrease in "Worse" answers.

Exhibit 3.8: Has tourism made issue better or worse? (Q12)

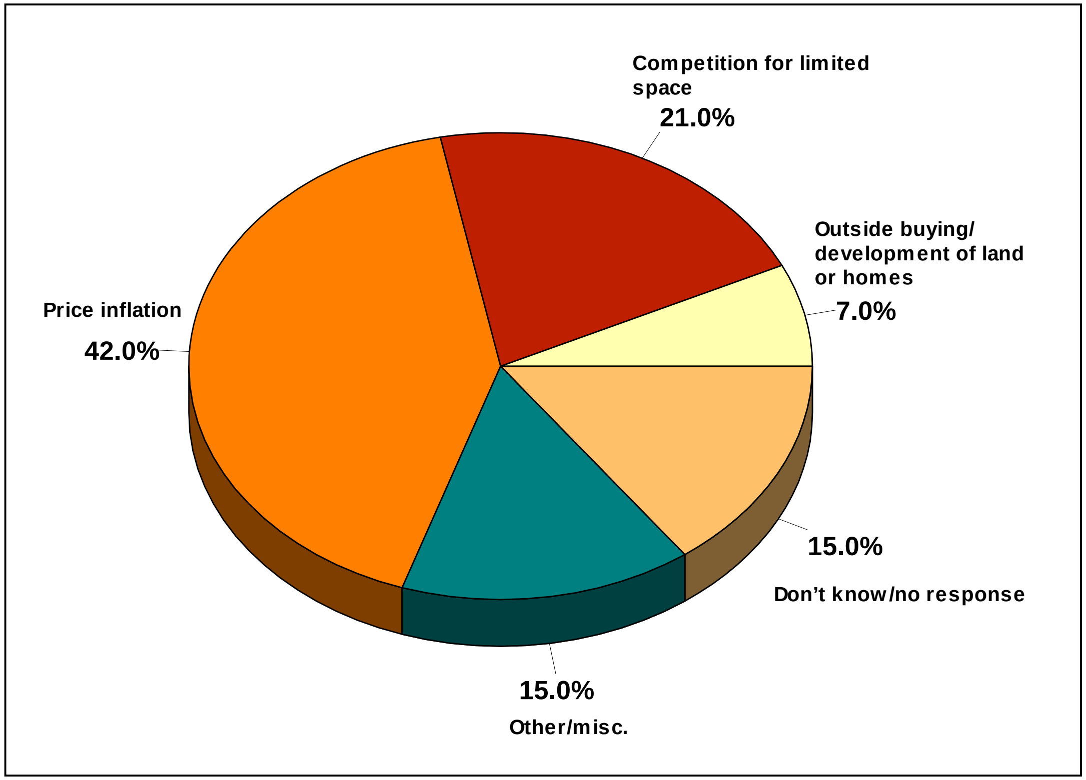
	1988 "BETTER"	1999 "BETTER"	2001 "BETTER"	*2001 "WORSE"*	2002 "BETTER"	*2002 "WORSE"*
Number of jobs	82%	67%	73%	*14%*	80%	*7%*
Shopping, etc. for residents	60%	51%	67%	*15%*	70%	*8%*
Overall standard of living	63%	49%	55%	*21%*	67%	*9%*
Overall quality of life	N/A	49%	59%	*14%*	66%	*9%*
Average income for residents	N/A	N/A	N/A	*N/A*	54%	*15%*
Relations between people	35%	45%	53%	*15%*	47%	*11%*
Preservation of Hawaiian culture	47%	42%	40%	*29%*	46%	*19%*
Diversity of economic activities	N/A	47%	52%	*20%*	45%	*20%*
Number and quality of parks	44%	44%	44%	*14%*	41%	*12%*
Preservation of nature	33%	35%	27%	*42%*	32%	*25%*
# of people living in your part of isle.	27%	34%	24%	*23%*	25%	*15%*
Cost of food and clothing	20%	32%	21%	*41%*	24%	*33%*
Quality of water and air	N/A	31%	17%	*43%*	16%	*31%*
Cost of housing	8%	26%	11%	*48%*	15%	*35%*
Crime	6%	22%	7%	*63%*	8%	*41%*
Traffic	4%	22%	3%	*78%*	7%	*54%*

N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999; 3,904 for 1988. Note: 2001 and 2002 "Better" and "Worse" %'s do not add to 100% because people could also say "No Effect" or "Don't Know." (This was true for these items in all four surveys.) It may be noted that items toward the bottom of the list had more "No Effect" responses, especially in 2002.

Additional Perceptions About Tourism Impact on Housing Affordability

As noted on the previous page, large minorities of Hawaii residents believe tourism negatively affects cost of housing in Hawaii. From an economic perspective, this belief makes sense for residential housing near Neighbor Island resort areas, where housing demand often outpaces supply due to both rapid growth of the residential population and sometimes also because of "spillover" housing demand for vacation homes nearby but outside resorts. However, the cause-effect connection between tourism and housing cost is less obvious for places like East Hawaii, East Maui, or particularly on Oahu. Therefore, we added an open-ended question this year asking those residents who said tourism "makes housing costs worse" to explain why they thought so.

Exhibit 3.9. Reasons Why People Think Tourism Makes Cost of Housing "Worse"(Q16)



- As indicated, the most common specific types of answers could be assembled into categories having to do with the concepts of "price inflation" and "competition for limited space." The percentages shown in Exhibit 3.9 varied little from place to place.

- Some examples of the "price inflation" idea:

  - *"Anything having to do with tourism is more expensive than it would normally be, and the residents suffer because of it."*

  - *"[Tourism] attracts the rich to stay here in Hawaii – drives the real estate up and local people cannot afford."*

- Some examples of "competition for limited space:"

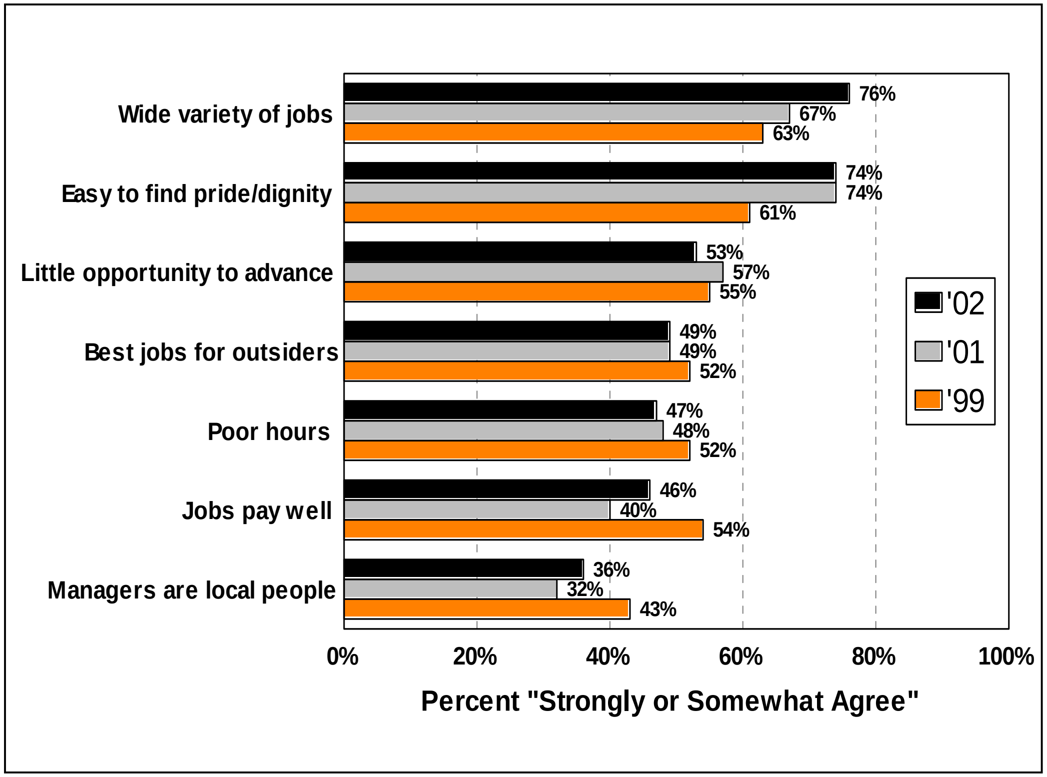
  - *"The more people, the less land and higher the price!"*

  - *"The more they build, they're going to run out of room for residents and drive the prices up."*

RESIDENT ATTITUDES TOWARD VISITOR INDUSTRY JOBS AND VISITORS

VISITOR INDUSTRY JOBS

Exhibit 3.10: Do you agree or disagree with the following statements? (Q17)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

- Residents' mixed feelings about tourism are once again reflected in their beliefs about tourism work. Most respondents agreed that Hawaii's visitor industry consists of a wide variety of jobs (76% in 2002) in which they can find pride and dignity (74%, a significant increase over the 1999 figure of 61%). (See Exhibit 3.10)

- However, they also said jobs in this field offer little chance for advancement (53%). This was thought to be particularly true for those who are Hawaii-born: 49% believed the best jobs go to those from outside Hawaii, and only 36% believed that most visitor industry managers are people who grew up in Hawaii.

- Less than half the 2001 and 2002 samples thought "Most visitor industry jobs pay pretty well," a decrease from 1999 levels.

- Detailed results show fairly consistent perceptions across islands, but Lanai had a very high percentage agreeing that tourism jobs pay well (67%) and yet also a very high percentage saying the best jobs go to outsiders (73%). Both figures were highest in the state.

Exhibit 3.11: Agreement with selected attitudes toward jobs (Q17) by household tourism work affiliation

Statement	HH's with 1+ Tourism Workers	Households with Workers, None in Tourism	Households with No Workers At All
Jobs pay well	60%	58%	46%
Little oppty for advancement	56%	67%	71%
Poor hours	55%	60%	69%

Figures represent % saying Strongly or Somewhat AGREE with statement. Don't knows have been excluded because non-tourism households were much more likely to have no opinion.

- Households with no workers at all (e.g., retirees, the unemployed, or the very affluent) have somewhat more negative views of tourism jobs in response to certain questions – especially compared to households with at least one tourism worker.

- In 2001, we were able to perform a slightly different analysis, comparing views on these same items for individuals who were currently holding tourism jobs, working in other private-sector jobs, or not employed at all. The percentages were almost identical to those in Exhibit 3.11.

- It should be noted that we found somewhat lesser differences in regard to other questions about visitor industry jobs. For example, there was virtually no difference among these groups in high levels of agreement that it's "as easy to find pride and dignity" in tourism as in any other job.

How Many People Think of "Visitor Industry Jobs" Simply as "Hotel Jobs?"

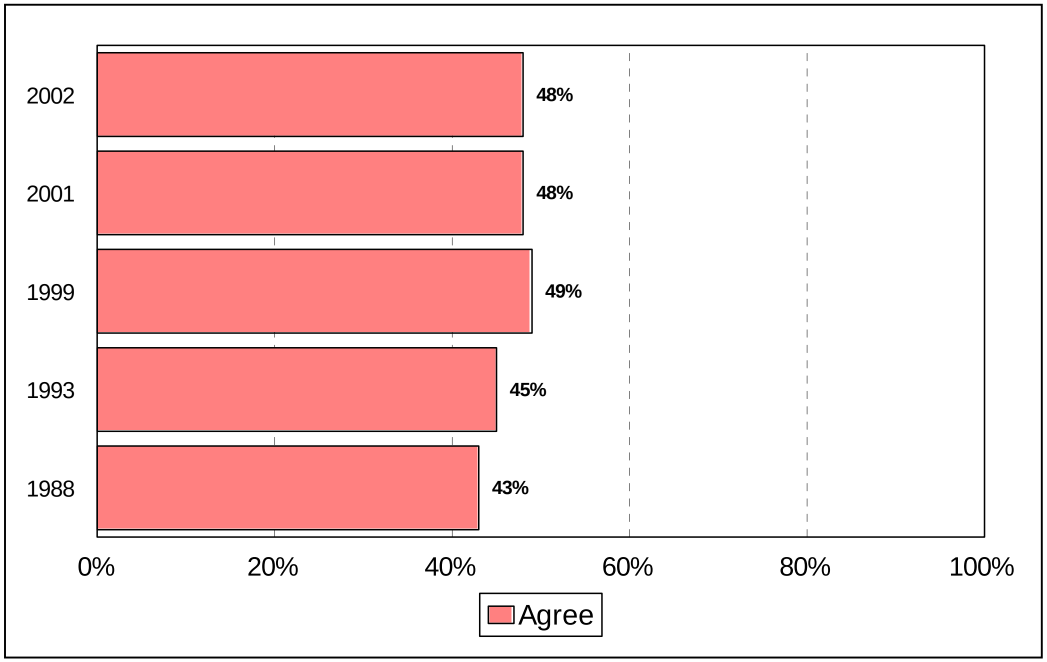
Exhibit 3.12. Image of "Visitor Industry Job" and Relation to Previous Answers (Q17h by 17a-g)

	"When I think about visitor industry jobs, I am really thinking mostly just about hotel jobs."	
	Agreed	**Disagreed**
	45%	48%
% Agreement with Items Based on Answer Above		
"Most visitor industry jobs pay pretty well."	53%	41%
"Most tourism jobs don't have much opportunity for advancement."	65%	44%
"There's a wide variety of jobs in Hawaii's visitor industry."	75%	82%
"The best tourism jobs to go to out-siders a lot more than to local people."	61%	42%
"Tourism workers often have poor hours or work only part of the year."	58%	40%
"These days most visitor industry managers grew up in Hawaii."	40%	35%
"It is as easy to find pride and dignity in tourism work as any other job."	75%	79%
Base (weighted statewide number)s:	**(744)**	**(792)**

- After we finished asking the other questions about visitor industry jobs, this year we added a new follow-up: Were people thinking about "visitor industry" jobs simply as "hotel jobs?" Exhibit 3.12 shows that 45% said they were, and 48% said they were not. (The other 7% were unsure.)
- We then checked to see if answers to the other questions about tourism jobs depended on whether their mental image was mostly about hotel jobs. As Exhibit 3.12 shows, we found that people who agreed they were mostly thinking about hotel jobs usually had higher rates of agreement on almost every other question, too. This is what researchers call an "acquiescence bias" -- a tendency to say yes to everything.
- However, the differences were much higher for <u>negatively</u> worded items. That is, critical statements (such as "little opportunity for advancement") were agreed to even more by people who said their image of a tourism job was essentially a hotel job. So we conclude that part of this difference for negative perception is acquiescence bias, but another part of it involves a real difference between perception of "hotel jobs" and the wider concept of "visitor industry jobs."
- ***Summary:*** People who equate "visitor industry jobs" with "hotel jobs" only have a more negative image.

WHETHER VISITORS ARE SEEN AS BEING GIVEN PRIORITY OVER LOCAL PEOPLE

Exhibit 3.13: Do you agree that the island is being run for tourists at the expense of the local people? (Q11a)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999; 500 for 1993; 3,904 for 1988

- A more extensive series of questions about attitudes toward visitors was asked in 1999 and 2001 (see Part IV of report). These showed generally friendly attitudes. However, one key "negative" question – dealing with potential underlying political resentment – was retained for this 2002 survey.

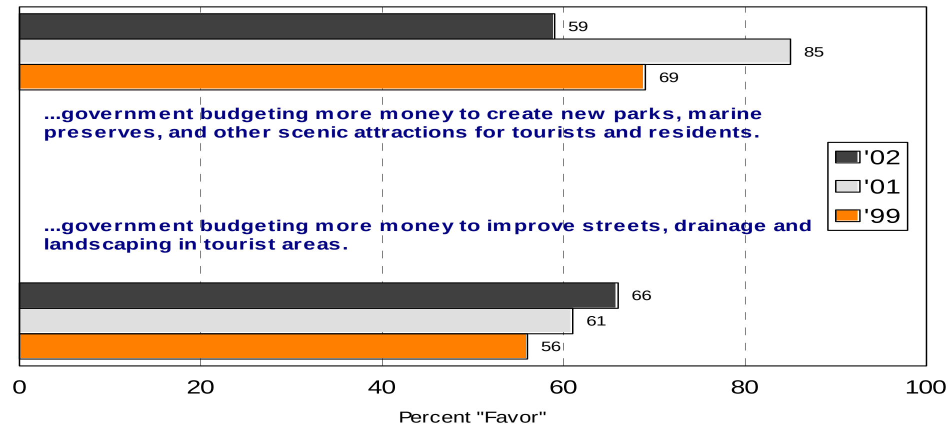
- A comparison of results from previous surveys (1988, 1993, and 1999) shows a leveling-off in what had been steadily increasing agreement that "This island is being run for tourists at the expense of local people." In 1999, the percentage of those agreeing with this statement had increased by 6% over a decade ago, but the identical 2002 and 2001 48% levels almost exactly matched the 1999 figure. (See Exhibit 3.13)

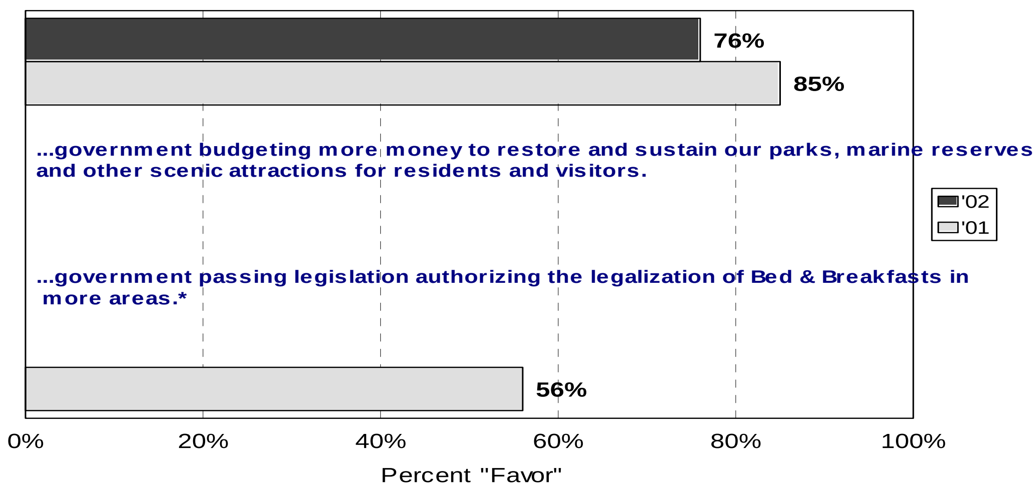
- Also exactly as found in 1999, Maui had the highest level of agreement with this expression of alienation – 60% in 1999, and 55% in both 2001 and 2002 (though Kauai was also high in 2002 with 58%). The Big Island had the lowest levels of agreement all three years – 39% in 1999, 43% in 2001, and 42% in 2002.

OPINIONS ON SELECTED POLICY ISSUES

ATTITUDES ABOUT GOVERNMENT ACTION ON TOURIST-RELATED INFRASTRUCTURE

Exhibit 3.14: Tell me if you would strongly favor, tend to favor, tend to oppose or strongly oppose… (Q5) <u>Note:</u> %'s in exhibit combine "strongly" and "tend to favor"





*Not asked in 2002
N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

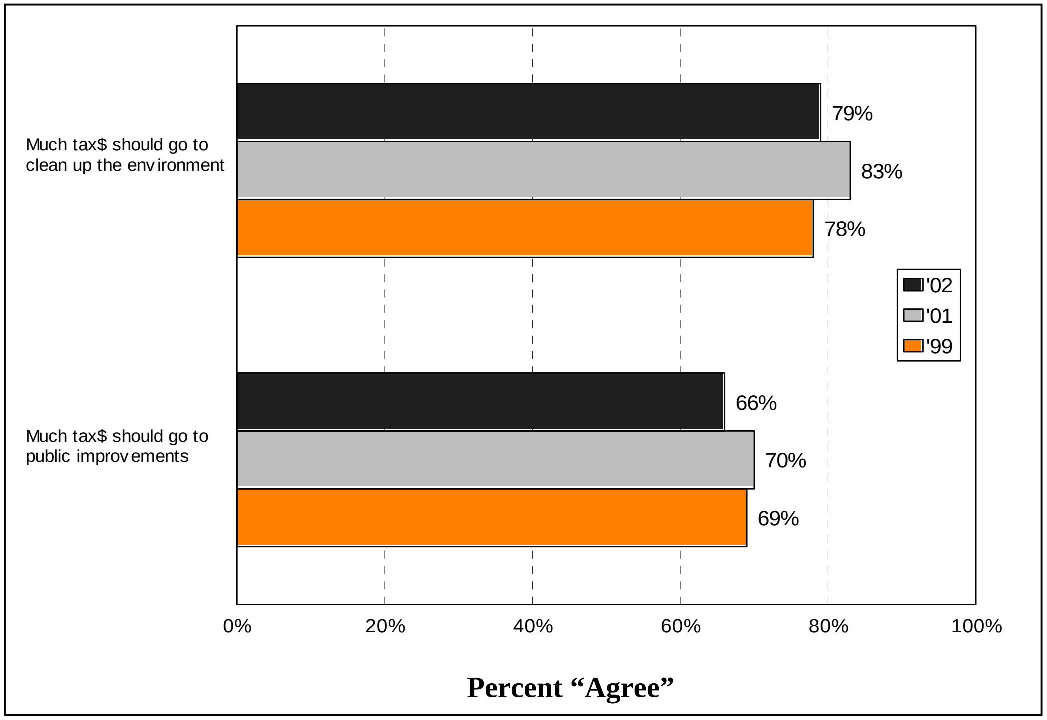
- Majorities – statewide and in all counties – support budgeting more money for various activities that can be said to "improve the tourism product." (See Exhibit 3.14)

- However, there was a sharp decrease from 2001 to 2002 in the size of the majority that would approve more money "to create <u>new</u> parks, marine preserves, and other scenic attractions." In 2002, there was much more support for government expenditures to "<u>restore and sustain</u> parks, marine preserves, and other scenic attractions" – though there was even a significant reduction in support for that, as well.

- By contrast, there has been increasing support over the past few years for government spending to improve infra-structure "in tourist areas." Again, it's hard to say whether Sept. 11 may have had any role in the 2001-02 change, since a trend was already evident following 1999.

- In 2001, a slight majority (56%) favored or tended to favor legalizing bed and breakfast facilities in more areas. (In 2002, we asked a different question about B&B's.)

Exhibit 3.15: Do you agree or disagree with the following statements? (Q9 partial)

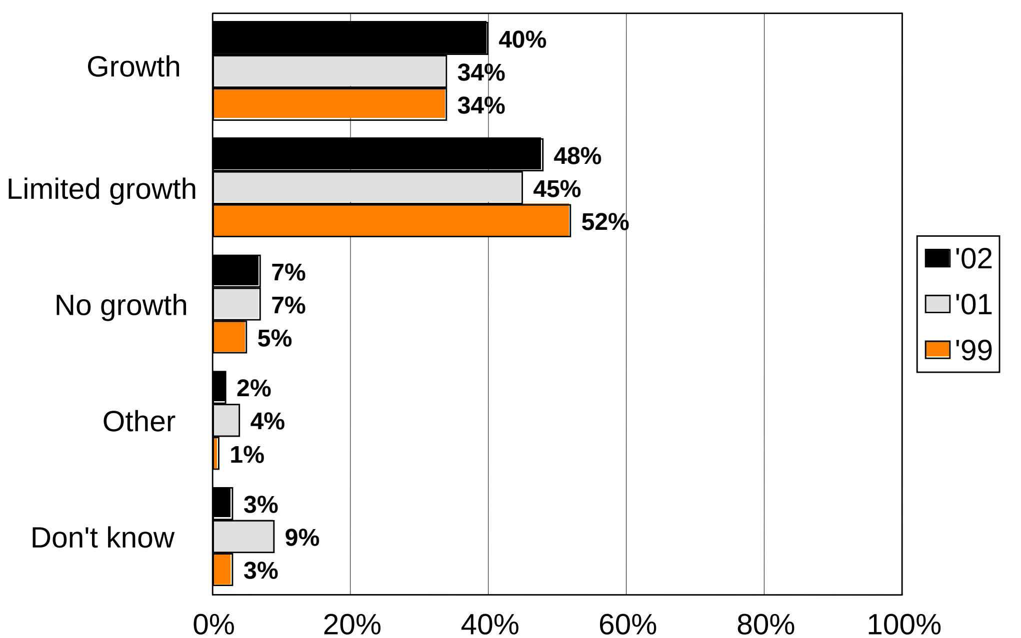


N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

- Residents strongly support using "tax money from tourism" for both environ-mental cleanup (79% in 2002) and public improvements in visitor areas (66%). (See Exhibit 3.15) This strong support has been found in all three recent surveys, and has been fairly consistent across all counties.

ATTITUDES TOWARD TOURISM GROWTH

Exhibit 3.16: Which of the following comes closest to your feelings about tourism growth in Hawaii? (Q4)



Note: ***Growth =*** ***Unless we are sure some other major industry will work here, we must support more tourism growth.***

Limited Growth = ***We should support more tourism growth in the short term, but we have to accept long-term limits***

No Growth = ***We should not support any more tourism growth even if that means the economy will stay the same or get worse***

Remaining percentage reflects those who could not answer.

N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

- Both before and after Sept. 11, roughly half of Hawaii residents supported growth in the short term, but felt a need for long-term limits even if other industries are not viable alternatives. Only about 7% have wanted no tourism growth "even if that means the economy will stay the same/get worse."

- About 40% felt Hawaii must support tourism growth indefinitely (i.e., "unless we are sure some other major industry will work here"), a slight increase since 2001. (See Exhibit 3.16)

- These figures were fairly similar for all counties, though Neighbor Islands (with the exception of Lanai) had slightly lower "support growth" figures than Oahu – but the differences were generally not large enough to reach statistical significance.

- Detailed figures show a moderate relationship between support for ongoing tourism growth and household income. For example, just 35% of people with incomes under $50,000 supported indefinite growth, while there was 51% among people with incomes over $75,000.

Exhibit 3.17. Which of the following comes closest to your feelings about tourism growth in Hawaii? (Differences by Tourism Job Affiliation)

	Have held tourism jobs	HH member now in tourism job	No tourism job affiliation
Support growth unless sure other industry will work	44%	36%	39%
Support growth for now, but long-term limits	54%	49%	52%
Don't support growth, even if economy worsens	4%	8%	5%
Don't know/other	4%	6%	4%
Base	462	926	240

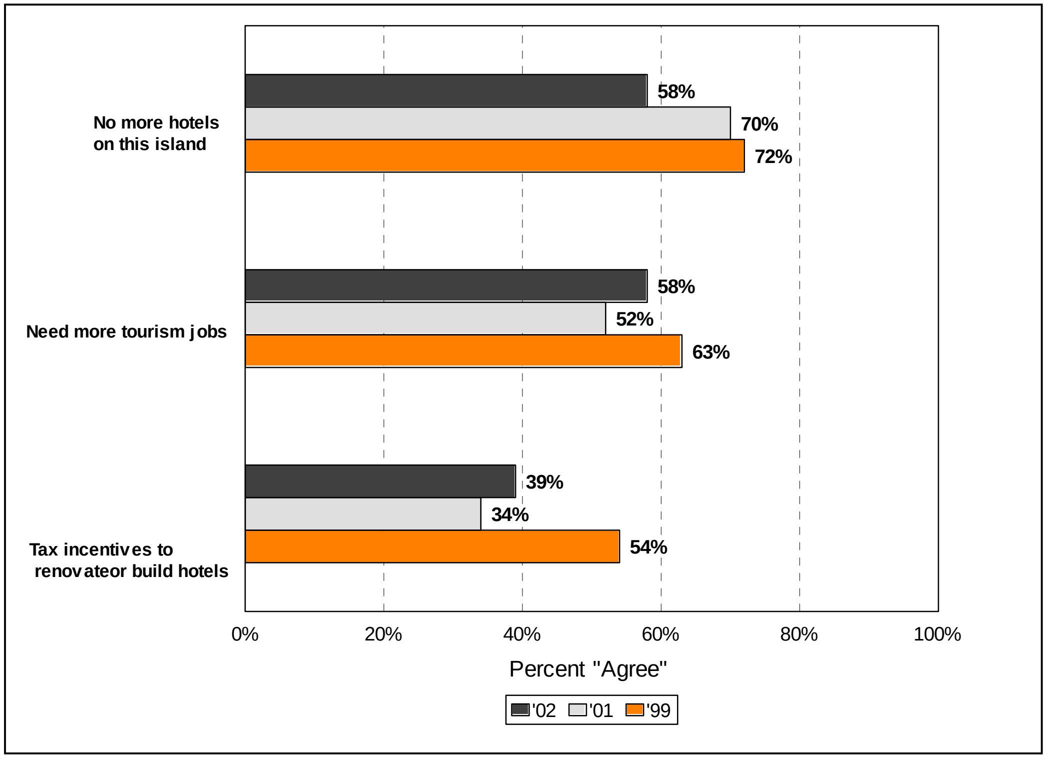
- Respondents with current or previous tourism jobs were slightly more likely to support indefinite tourism growth than others. This pattern – i.e., some, but not dramatically, more support among tourism workers – was found in past surveys as well.

- We also looked at the effects of number of tourism workers in the household and strength of belief that one's own job depends on the visitor industry. Neither of these had any clear effect on attitudes toward growth. This was also the case in past surveys.

- This is particularly interesting in light of the foregoing finding (see previous page) that household income does have some effect on attitudes toward support for growth. The income effect may be due to educational differences. Or – as was suggested in the 1988 DBEDT study – people who do well in a tourism-based economy may be more likely to support tourism whether or not they directly attribute their own economic status to tourism.

TYPES AND GENERAL LOCATIONS OF DESIRED GROWTH IN TOURISM ACTIVITIES

Exhibit 3.18. Which of the following comes closest to your feelings about tourism Growth in Hawaii? (Q9 partial - 1993 and 1988 comparison)



N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999; 500 for 1993; 3,904 for 1988

	1993	1988
No more hotels on this isle	**74%**	**68%**
Need more tourism jobs	**N/A**	**43%**
Tax incentives to renovate/build new hotels	**N/A**	**N/A**

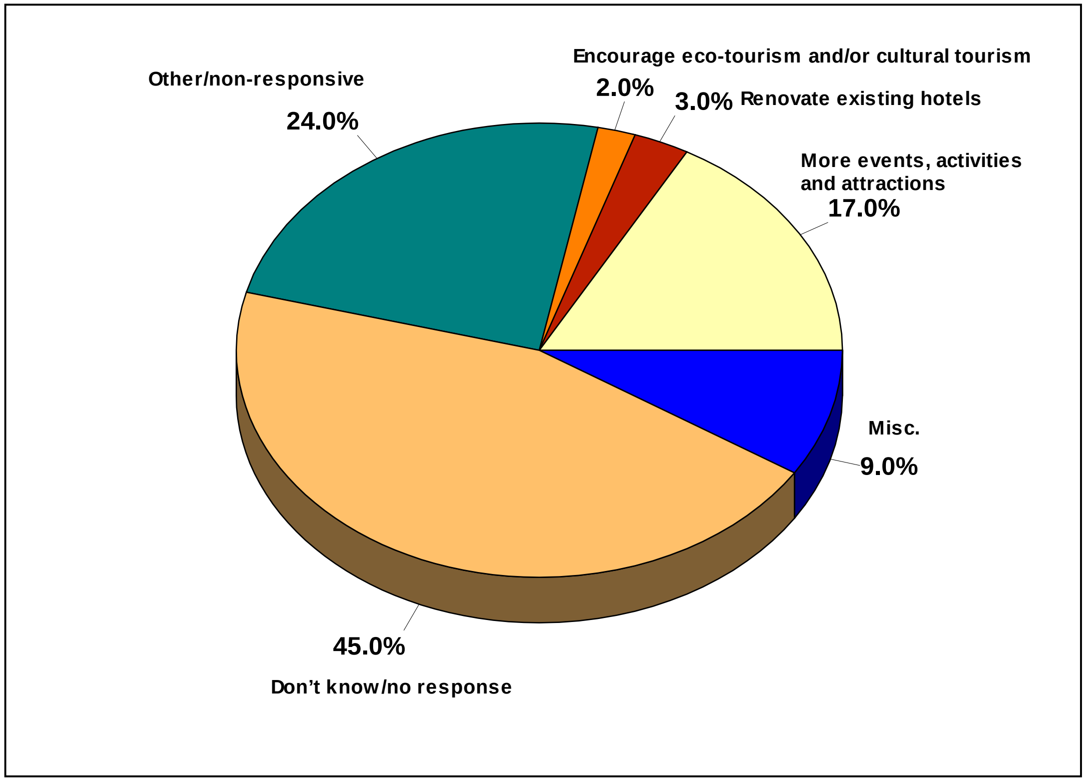
- As in 1999, majorities of residents favored creating more tourism jobs (58%) on the one hand, but banning new hotels on the other hand (also 58%, a significant drop from the 1999 and 2002 support levels). (See Exhibit 3.18)

- Although exact percentages differed from place to place, the overall pattern of wanting more jobs but not more hotels held true almost everywhere. It was particularly apparent on <u>Molokai</u>, where a statewide high of 74% wanted more tourism jobs, but 63% still wanted no more hotels. Only in <u>East Hawaii</u> were there slightly more people favoring than opposing more hotels.

- Support for tax incentives to renovate or build new hotels was up slightly in 2002 (a 39% minority), but this was still a marked reverse in public opinion since 1999, when a 54% majority agreed with this policy. Detailed figures show <u>Molokai</u> was the only island where a majority still supported such incentives in 2002.

As just noted, majorities of residents in several surveys say they favor growth in tourism jobs but oppose new hotels. From some perspectives, this is a contradictory message, although it might make sense if there is an underlying rationale such as, “New visitor accommodations ought to be in cruise ships or B&B’s rather than hotels” or “We need more jobs visitor attractions or retail activities to serve the hotel guests we already have.” Therefore, this year we identified people who both favored growth in tourism jobs but opposed new hotels. We wanted to see how many of these people there were and to ask them to explain in their own words: “Do you have any ideas how we can create new tourism jobs without building any more hotels?”

Exhibit 3.19. How can we create new tourism jobs without building more hotels? (Q10)



- Analysis showed that roughly half those who wanted more tourism jobs also said they wanted no more hotels.

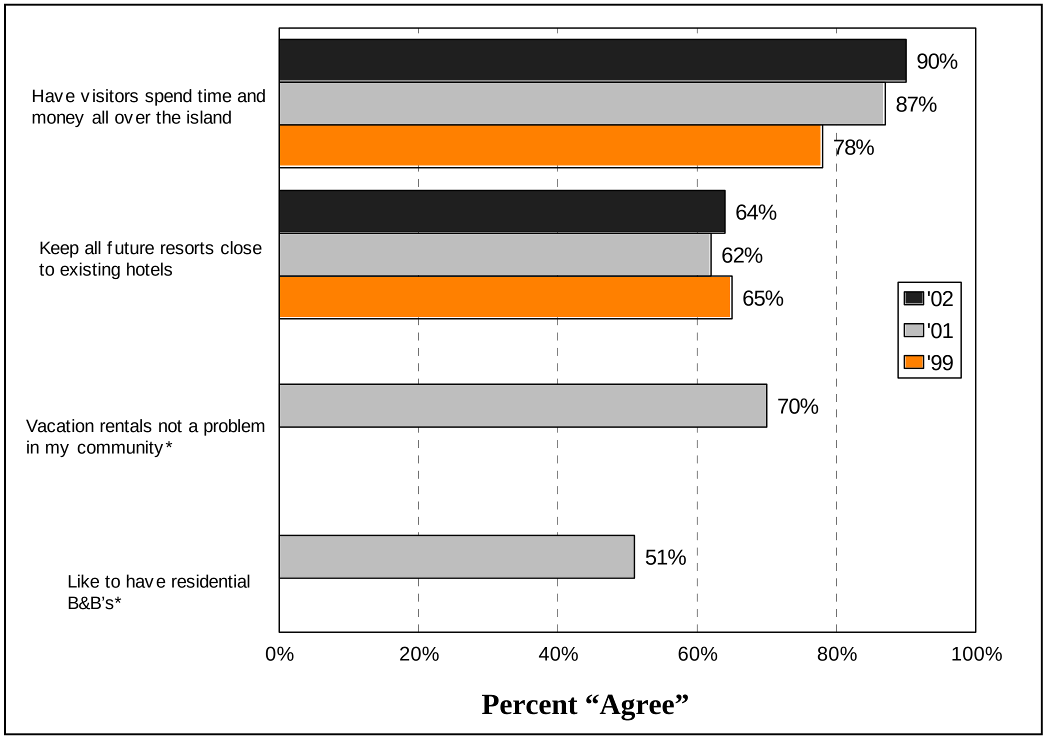
- Unfortunately, the open-ended question posed to these people gave us little in the way of useful answers. Most people said they didn’t know or gave answers that seemed like responses to some other question than the one that was asked.

  This might mean that people really were being somewhat irrational, as they seemed unable to explain themselves. But it might also be that the open-ended question format was unclear and/or that interviewers – trained to take down answers exactly as given – failed to press for really responsive replies.

- We would recommend that, in future surveys, this question to the people who gave “contradictory” answers be reworked into a closed-ended question.

Concentrating / Dispersing Hotels Vs. Other Tourism Activities

Exhibit 3.20: Do you agree or disagree with the following statements? (Q9 partial)



* Not asked in 1999 or 2002. The 2002 survey instead asked about B&B's and vacation rentals in the context of "small-scale" tourism activities (see previous results in Part II). and policy question about the nature of the visitor industry (2nd page following this).
N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

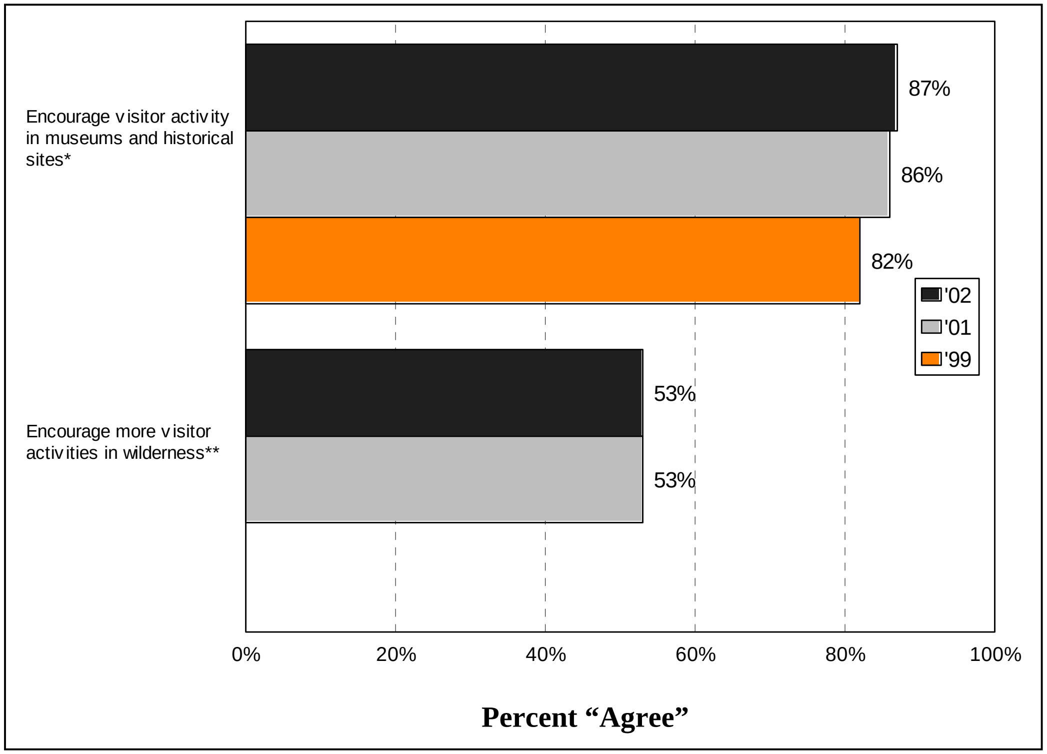
- Residents again make a distinction between hotels and other aspects of the visitor industry when it comes to questions about dispersing or concentrating tourism activities.

- There was near-universal agreement (90% in 2002, even more than in 1999) that visitors and their money are welcome all over each island, not just in resort areas. But if any future resorts are permitted, a majority (64%, about the same as in 1999 or 2001) felt they should be kept close to existing hotels. (See Exhibit 3.20)

- Consistent with the pattern of welcoming non-hotel visitor activities, majorities in 2001 said they would support bed & breakfast/farm stays (51%) and agreed that vacation rentals (70%) "are not a problem in my community." However, there were substantial minorities opposed to B&B's in all counties except the Big Island, where support overwhelmed opposition by a 2:1 ratio.

Dispersing Visitors to Cultural and Wilderness Areas

Exhibit 3.21. Do you agree or disagree with the following statements? (Q9 partial)



*Encouraging visitor activity in outdoor areas had been included in 1999 wording; the outdoor "wilderness area" was spun off into a separate question in 2001.

**did not ask in 1999

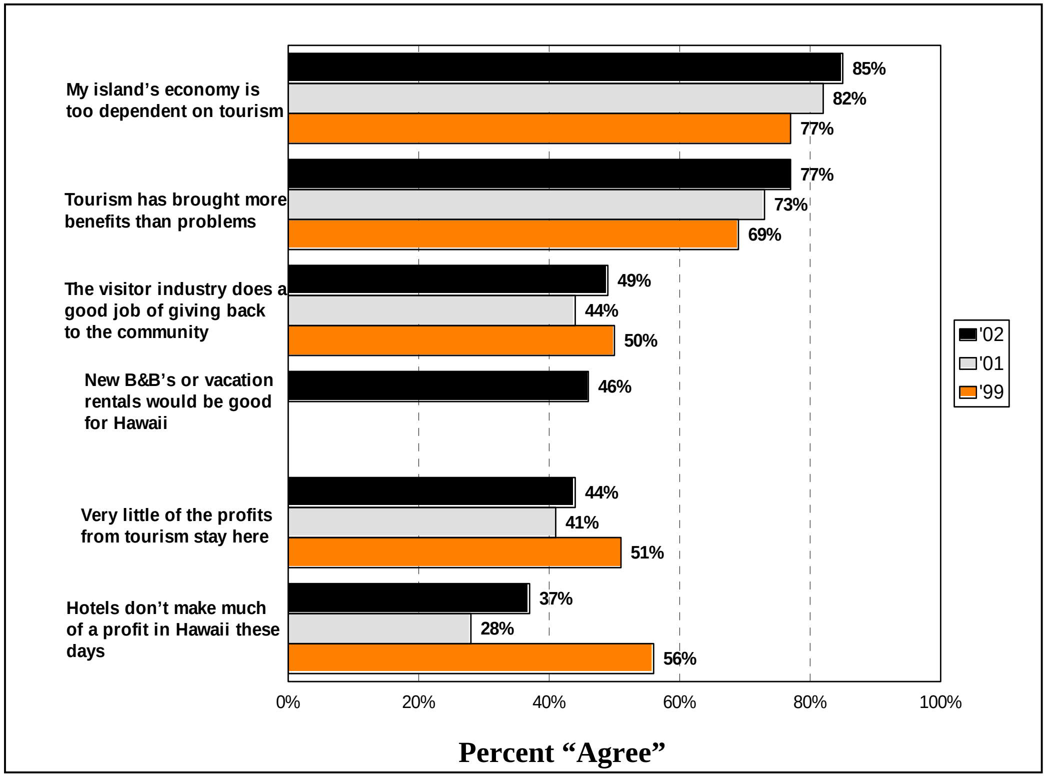
N = 1,643 for 2002; 1,007 for 2001; 1,003 for 1999

- Residents overwhelmingly (87%) want to encourage visitor activity in museums and historical sites, and a smaller majority (53%) would encourage visitor activity in wilderness areas. (See Exhibit 3.21) These figures have remained quite consistent for the past few surveys.

- On Kauai and Maui Island, however, there was almost as much *dis*agreement (45% each) as agreement (about 50% each) that visitors should go more into wilderness areas. These islands may be more affected by "outdoor adventure" or "eco-tourism" than other places in Hawaii.

BELIEFS ABOUT THE NATURE OF THE VISITOR INDUSTRY

Exhibit 3.22: Do you agree or disagree with the following statements? (Q11)



*did not ask in 1999 or 2001

- Agreement that various islands in Hawaii are "too dependent" on tourism was already at the 78% level in 1988, and seems to be increasing even more in the last few years. (See Exhibit 3.22) Detailed 2002 figures II show that only Molokai residents had substantial disagreement (42%) with this statement.

- Nevertheless, 77% statewide felt "tourism has brought more benefits than problems to this island." (Exhibit 3.22) That figure was much the same when the question was asked in 1988 (74%), in 1993 (75%), in 1999 (69%), and 2001 (73%).

- Only around 50% or less believed the visitor industry does a good job in giving back to the community or that more B&B's/vacation rentals in residential areas would be good for Hawaii. Consistent with the 2001 finding reported two pages earlier, there was also more 2002 support for B&B's on the Big Island than elsewhere.

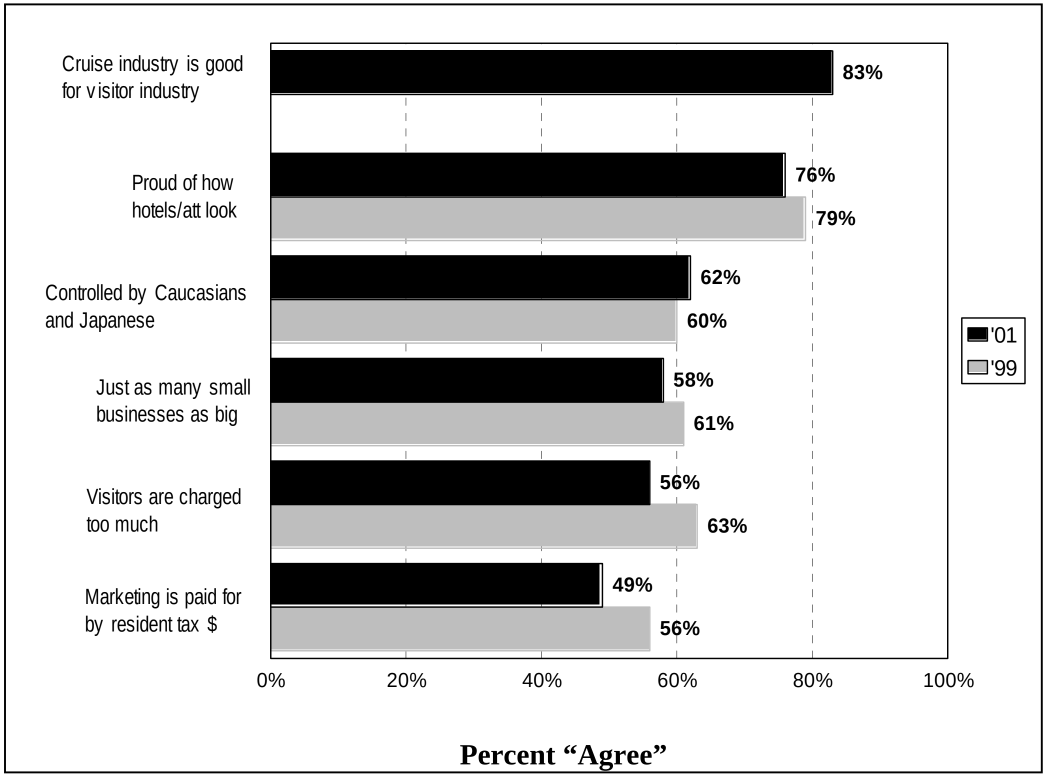
- There has been a sharp drop since 1999 in the perception that "hotels don't make much of a profit in Hawaii these days."

IV. QUESTIONS ASKED IN 2001 BUT NOT 2002

(These questions were dropped from the 2002 survey to make room for new questions discussed in Part II above. However, they may possibly be repeated again in future State surveys. The 2001 results are included in this report simply for purposes of completeness and public disclosure. It should be remember that 2001 data were collected in August of that year, shortly prior to September 11 and the consequent severe disruptions of the Hawaii visitor industry.)

BELIEFS ABOUT THE NATURE OF THE VISITOR INDUSTRY (NOT ASKED IN 2002)

Exhibit 4.1. Do you agree or disagree with the following statements? (2001 Q8)



- The 2001 survey found overwhelming agreement that "The cruise ship industry is good for Hawaii's visitor industry." This is perhaps a truism, but takes on new significance given the current state of the nation's airlines. (See Exhibit 4.1)

- A plurality of residents (49%, down a little from 1999) believed that tourism marketing is paid by their tax dollars. There was less belief in 2001 than in 1999 that hotels were struggling to make a profit or that the visitor industry adequately "gives back" to the wider community.

- Majorities in both 1991 and 2001 said they were proud of how visitor areas look, though they felt tourism is "mostly controlled by Caucasians and business people from Japan. Majorities also felt tourism consists as much or more of small businesses as big ones, and that visitors "often are charged too much money for what they get."

PERCEPTIONS OF ECONOMIC GROWTH AS A FUNCTION OF TOURISM GROWTH/STAGNATION

BELIEFS ABOUT EFFECTS OF "NO GROWTH" IN TOURISM ON GENERAL ECONOMY

Exhibit 4.2. Assuming the number of tourists stays the same over next 10 years, will Hawaii economy get worse, stay the same, or somehow get better? (2001 Q13, by County)

	State	Oahu	Maui	Kauai	Big Island
Worse	39%	40%	30%	36%	43%
Same	31%	31%	36%	34%	28%
Better	21%	20%	26%	21%	18%
Not Sure	9%	9%	8%	9%	12%

2001 N = 1,007

- This question, not asked in 1999, was intended to measure the extent to which residents see tourism growth/stagnation as key to economic growth in general.

- Statewide, most residents felt that a "no-growth" tourism future would lead to either a worse economy (39%) or one that stays the same (31%), with a few more saying "worse" than "same." About 21% felt the economy could even get better, and about 9% were simply unsure. (See Exhibit 4.2)

- Consistent with other survey results indicating a sense of growth stress on Maui, residents there were a little more likely to say a flat visitor count could produce a "better" economy (26%), a little less likely to say it would generate a "worse" one (30%).

REASONS FOR BELIEFS

Exhibit 4.3. Why would economy get (worse/better) if visitor count stays the same? (2001 Q13 A/B)

MOST FREQUENT REASONS PEOPLE THOUGHT ECONOMY WOULD GET WORSE

Increased cost of living	34%
Over dependence on tourism	28%
Lack of jobs	15%
Other	12%

MOST FREQUENT REASONS PEOPLE THOUGHT ECONOMY WOULD GET BETTER

We'd diversify into other industries	41%
General comments about new jobs, economic change	10%
Other	13%
Don't Know	27%

- In a follow-up question, people who said that a flat tourism count would produce either a worse or better economy were asked to explain why, in their own words.
- Those who said the economy would grow "worse" with a flat visitor count tended to emphasize belief that cost of living could increase, that Hawaii is too dependent on tourism, and/or that job growth would be cut off. (See Exhibit 4.3)
- Those who felt the economy would improve if tourism grew no further tended to believe that Hawaii would be able (or forced) to diversify into other industries. However, a substantial portion of this group also said they were unsure of the reasons or gave general and somewhat vague reasons.
- On the Big Island, about a third of those who said the economy would get "better" gave reasons that had to do with their belief that their own jobs did not depend on tourism, or that they simply preferred non-tourism work. Otherwise, there was little difference among the counties on either set of answers.

RESIDENT ATTITUDES TOWARD VISITORS

ATTITUDES TOWARD DECLINE IN VISITOR COUNT

Exhibit 4.4. Recently, fewer visitors have been coming to Hawaii. On the whole, would you say this makes you feel very happy, somewhat happy, somewhat unhappy, or very unhappy? (2001 Q2, by County)

	STATE	OAHU	MAUI	KAUAI	BIG ISLAND
very happy	5%	5%	5%	7%	7%
somewhat happy	13%	12%	19%	17%	12%
somewhat unhappy	42%	42%	36%	47%	51%
very unhappy	19%	20%	15%	12%	13%
mixed feelings	9%	9%	9%	6%	6%
DK/no feelings	12%	12%	17%	10%	11%

Note: Percentages that do not total 100% are due to rounding.
2001 N = 1,007

- In fact, more visitors had again been coming by 2000 and early 2001, but we retained the question wording for the sake of consistency.

- In the total State sample, about 5 in 8 said they were "unhappy" that fewer visitors are coming. 61% of the residents surveyed said they were either "somewhat unhappy" (42%) or "very unhappy" (19%) that there were fewer visitors coming to Hawaii. (See Exhibit 4.4) This level of concern has dropped slightly from 1999 (when 69% were unhappy), but is still much higher than when the question was first asked in '93 (when only 56% said they were unhappy).

- As was the case in 1999, Maui County residents in 2001 were relatively less concerned about the decline in visitor count. Among all the counties, Maui had the lowest percentage of residents who said they were "very" or "somewhat" unhappy about the decline – 51% -- although this of course is still a majority expressing unhappiness.

Exhibit 4.5. Recently, fewer visitors have been coming to Hawaii. On the whole, would you say this makes you feel very happy, somewhat happy, somewhat unhappy, or very unhappy? (By Job Type)

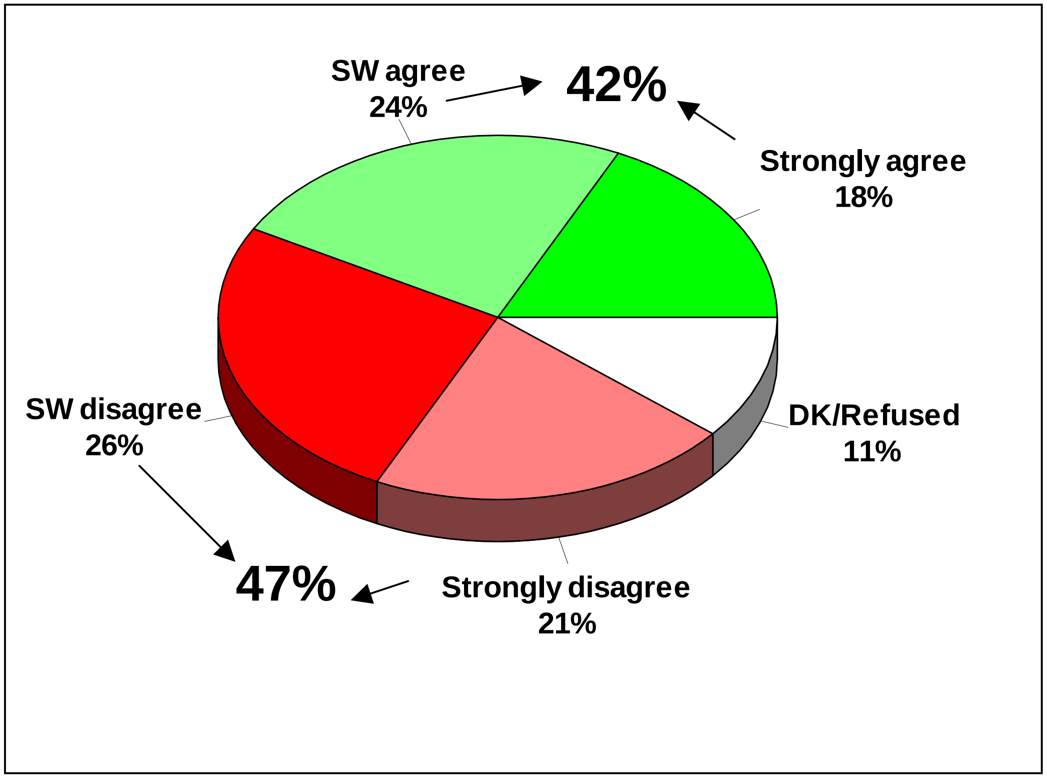
Statement	Tourism	Non-Tourism (Private)	Non -Tourism (Public)	Not Employed
Very happy	4%	6%	6%	6%
Somewhat happy	15%	14%	13%	12%
Somewhat unhappy	45%	43%	39%	43%
Very unhappy	27%	15%	13%	22%
Mixed feelings	6%	10%	14%	3%
No feelings / don't know	4%	13%	15%	14%

Note: Percentages that do not total 100% are due to rounding.

- Self-described tourism industry workers were more concerned that fewer visitors are coming to Hawaii. Across job types, 27% of tourism workers said they were "very unhappy" about the decline, compared to 15% of those with private jobs, 13% of those in non-tourism jobs, and 22% of those who were unemployed. (See Exhibit 4.5)

BELIEFS ABOUT COMMUNITY "ALOHA SPIRIT" TOWARD VISITORS

Exhibit 4.6. Do you agree or disagree that people on this island have as much Aloha Spirit for visitors as they did ten or twenty years ago? (2001 Q3)

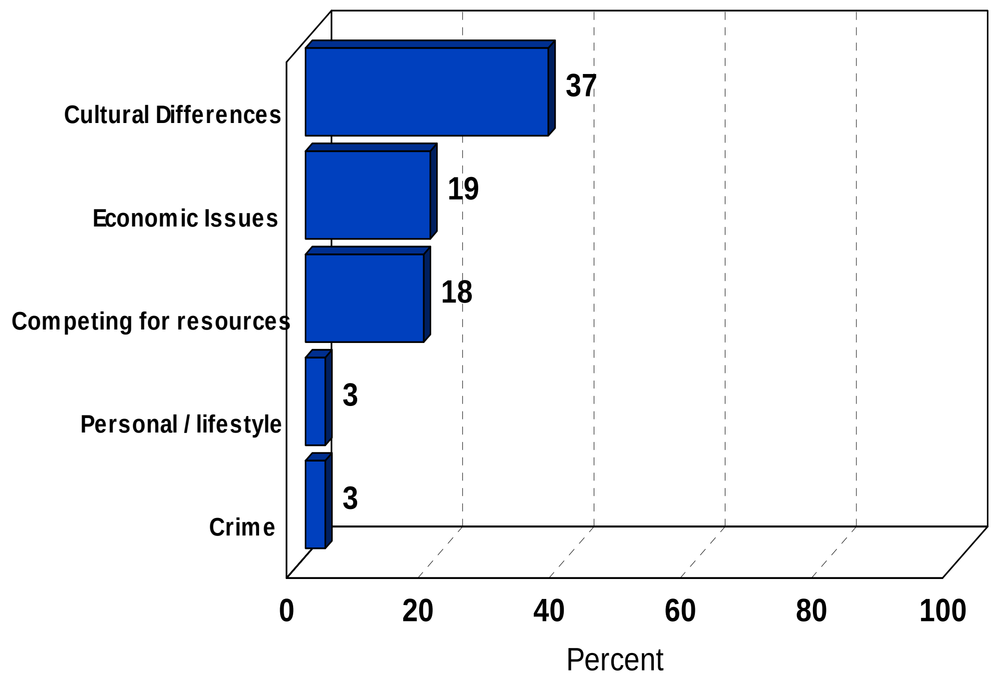


No significant difference from 1999 results
2001 N = 1,007

- Residents were roughly split in their opinions on whether the "Aloha Spirit" is still strong or is in decline. When asked, "Do you agree or disagree that people on this island have as much Aloha Spirit for visitors as they did 10 or 20 years ago?" 42% agreed and a near-equal 47% disagreed. (See Exhibit 4.6)

- These figures have changed very little over the years. In 1988, 45% agreed and 43% disagreed; in 1999, there was 46% agreement and an equal 46% disagreement.

Exhibit 4.7. Why do you think people do not feel as much Aloha Spirit for visitors? (2001 Q3A)

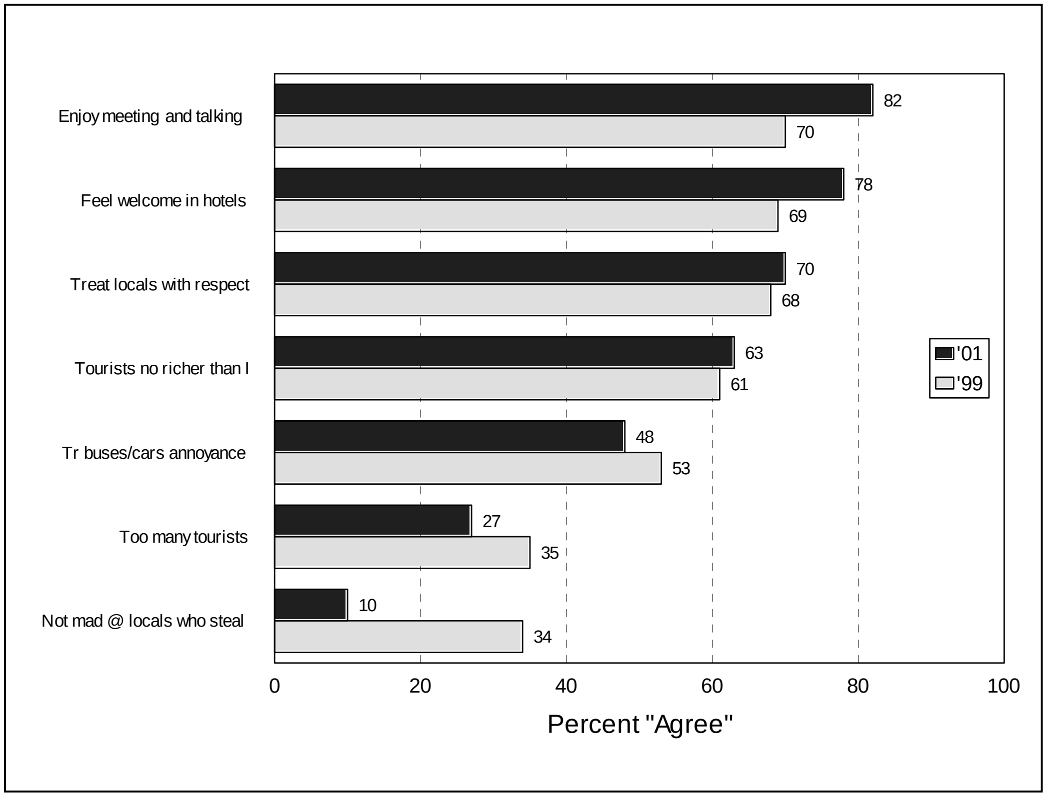


Reduced N. Figures represent those who think people DO NOT feel as much Aloha Spirit for visitors.

- Of those who thought people do not feel as much Aloha Spirit for visitors ("somewhat" or "strongly" disagreed with the question), 37% statewide cited cultural differences (about the same as in 1999), another 19% cited economic issues and 18% competition for resources (See Exhibit 4.7)

BELIEFS AND ATTITUDES TOWARD VISITORS THEMSELVES

Exhibit 4.8. Do you agree or disagree with the following statements? (2001 Q4)



2001 N = 1,007; 1999 N = 1,003

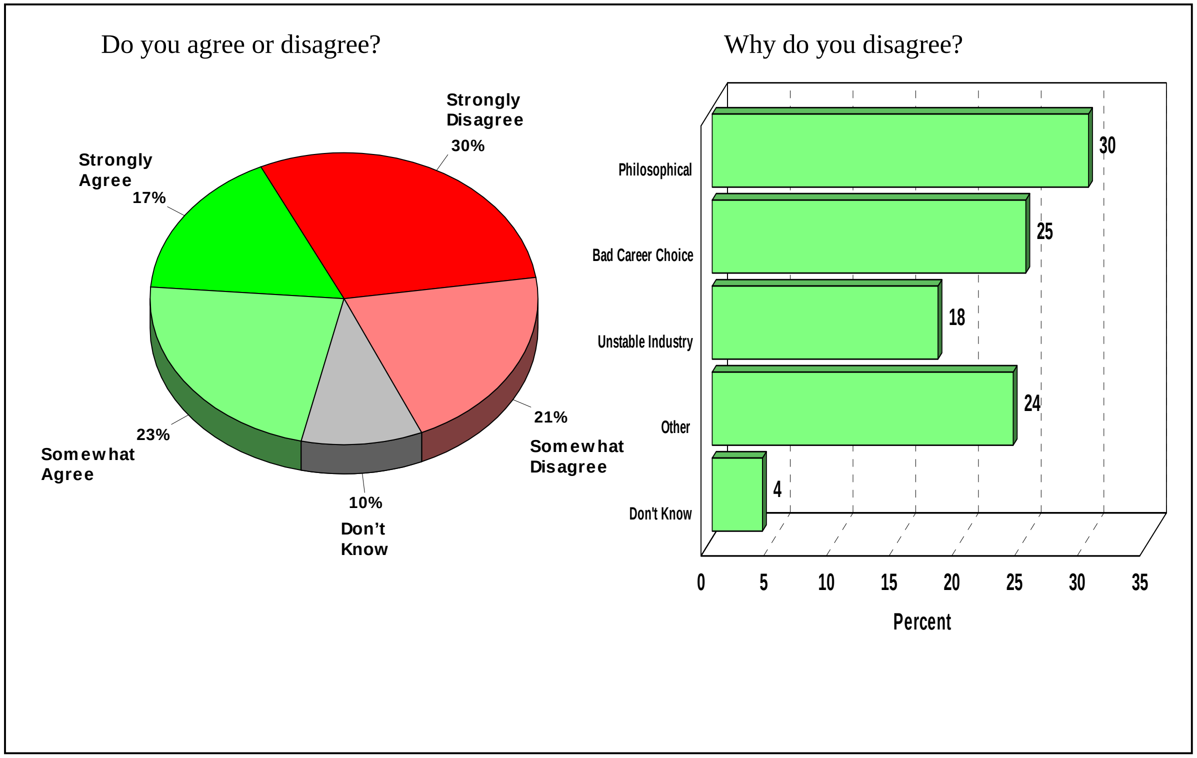
- Residents actually express a strong "Aloha Spirit" toward visitors as individuals. When asked whether they agreed or disagreed with a number of statements pertaining to direct visitor interaction, the majority agreed with such statements as: enjoy talking to visitors (82%), feel welcome in hotels (78%), visitors treat locals with respect (70%). (See Exhibit 4.8)

- It should also be noted that agreement with such positive statements somewhat increased from 1999 level – as did disagreement with negative statements. A particularly striking example involved the statement, "I really can't get mad at poor local kids who steal from tourists." In 1999, a "mere" 47% strongly disagreed; in 2001, 79% strongly disagreed.

RESIDENT ATTITUDES TOWARD VISITOR INDUSTRY JOBS (NOT ASKED IN 2002)

(Some questions relevant to this general topic were repeated in 2002, but the questions on this page and the next were not.)

Exhibit 4.9. Do you agree or disagree with "If I had a child going to college, I'd encourage the child to study visitor industry management." (Q14a, Q15a)

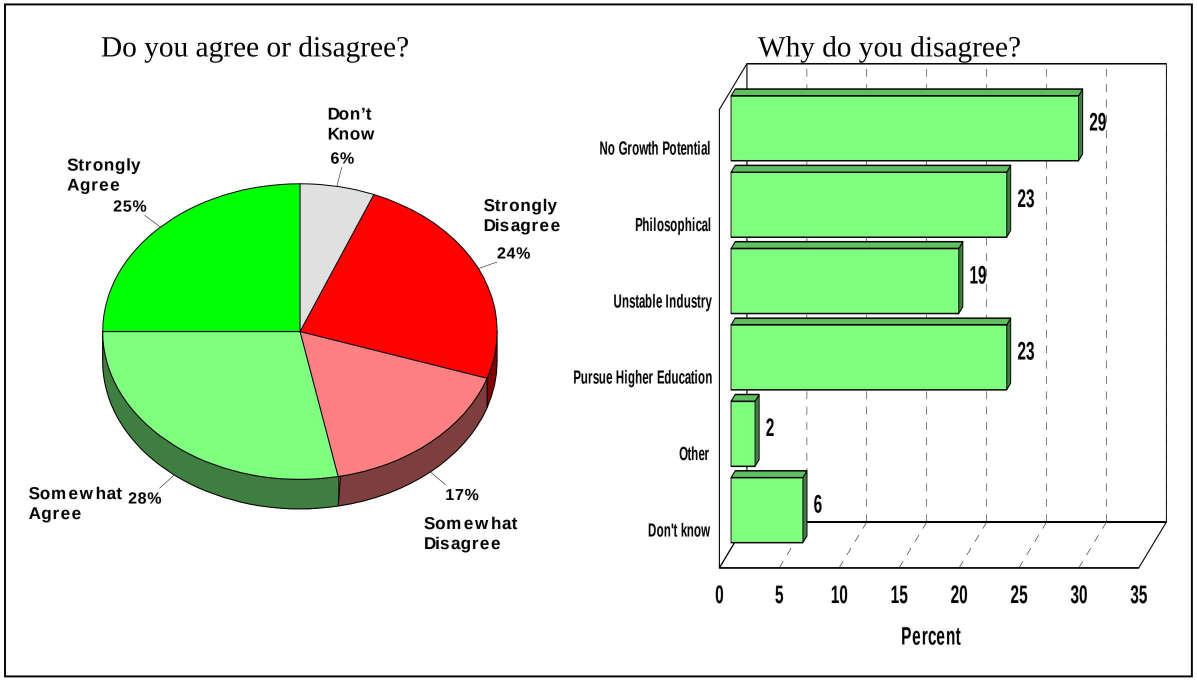


2001 N = 1,007; 1999 N = 1,003

- While parents would encourage their child with a high school diploma to get a job in tourism, they are less likely to encourage their college-bound children to study visitor industry management. Fifty-three percent of parents said that they would encourage their high school graduates to get a job in tourism, but only 40% said they would encourage college-bound children to study visitor industry management. (See Exhibits 4.9 vs. 4.10)

- Furthermore, the 40% encouragement figure for 2001 represents a slight drop from the comparable 1999 figure (46%).

Exhibit 4.10. Do you agree or disagree with "If I had a child with a high school diploma who wanted to work only in Hawaii, I'd encourage the child to get a job in tourism." (2001 Q14b, Q15b)



2001 N = 1,007; 1999 N = 1,003

- Only 41% indicated they would discourage high school graduates from entering the tourism industry, compared to 51% who would discourage college-bound children from studying visitor industry management. (Both these negative figures were up about 5 percentage points over the 1999 levels.) (See Exhibit 4.9 vs. 4.10)

- However, both groups – i.e., those discouraging college students and those discouraging high school students – shared the same top three reasons for doing so: no growth potential, philosophical (letting the child make the choice), and unstable industry.

PLACES WHERE RESIDENTS WOULD ACCEPT OR TOLERATE MORE TOURISM GROWTH

(Note: This series of 2001 questions was asked in open-ended fashion. Because results were not clear, the 2002 survey presented specific geographical areas to which respondents could react – see foregoing Exhibits 2.1 through 2.5 in Part II of this report. Following is the analysis that was originally presented in 2001:)

Exhibits 4.11 to 4.18 illustrate resident opinions about areas that could stand and accept more growth and areas in which they did not want to see more growth. This was the first time that questions of this nature were asked and the objective was to gain just a general perspective. Therefore, questions were asked in an unstructured and open-ended format. Caution must be used in interpretation of the findings as the basis for each response is not clearly known (e.g. extent to which people took a truly island-wide perspective vs. focusing on their own home area). Further research is required.

As an example, as Exhibit 4.12 on the next page shows, the most frequently named Oahu "no tourism growth" area was the already-urbanized Waikiki/Honolulu region. This should not be misinterpreted as resident permission to develop rural areas. In fact, most Oahu residents live in the urban/Honolulu area, and it is possible that many residents were simply objecting to more development near their homes.

Exhibit 4.11. GROWTH AREAS – OAHU (2001 Q17/18) Which areas could stand or accept more tourism growth? (Please describe the growth.)

	Total	Waikiki / Honolulu	North Shore	Ewa/ Kapolei/ Ko Olina	Leeward/ West Side	Waianae/ Makaha
Base **% isle total***	353 **100%**	39 **11%**	39 **11%**	56 **16%**	35 **10%**	25 **7%**
	%	%	%	%	%	%
Hotels / resorts		22	41	31	42	
Activities / attractions / entertainment		25	28	47	41	
Hiking / biking, parks / nature		7	5	2	6	
Roads / highways / infrastructure		18	14	12	2	
Golf Courses		N/A	N/A	N/A	1	
B&B / vacation rentals		3	13	N/A	7	

* Percentages add across this row to indicate the areas most frequently named (less frequent responses omitted here). Other column percentages show the specific types of desired growth most frequently mentioned for each of these areas. NOTE: Due to the large error associated with small bases, we do not show "type of growth" results for columns where the base was less than 20. Even results for columns with bases under 100 should be viewed with caution.

__Exhibit 4.12. NO TOURISM GROWTH AREAS - OAHU__

	Total	Waikiki / Honolulu	North Shore	Leeward/ West Side	Waianae/ Makaha	Growth Everywhere	No More Growth Anywhere
Base **% isle total***	353 **100%**	212 **60%**	14 **4%**	7 **2%**	4 **1%**	4 **1%**	39 **11%**
	%	%	%	%	%	%	%
Hotels / resorts		29					
Activities / attractions / entertainment		9					
Roads / highways / infrastructure		15					
Hiking / biking, parks / nature		1					
B&B / vacation rentals		N/A					

* Percentages add across this row to indicate the areas most frequently named (less frequent responses omitted here). Other column percentages show the specific types of desired growth most frequently mentioned for each of these areas. NOTE: Due to the large error associated with small bases, we do not show “type of growth” results for columns where the base was less than 20. Even results for columns with bases under 100 should be viewed with caution.

Exhibit 4.13. TOURISM GROWTH AREAS – BIG ISLAND

	Total	Kona / Kailua Kona / S. Kona	Hilo	S. Kohala / Kohala Coast / Waikoloa	West Side	N. Kohala
Base	168	37	42	27	2	7
% isle total*	**100%**	**22%**	**25%**	**16%**	**1%**	**4%**
	%	%	%	%	%	%
Hotels / resorts		36	23			
Activities / attractions / entertainment		36	34			
Hiking / biking, parks / nature		18	0			
Roads / highways / infrastructure		6	7			
B&B / vacation rentals		N/A	7			

* Percentages add across this row to indicate the areas most frequently named (less frequent responses omitted here). Other column percentages show the specific types of desired growth most frequently mentioned for each of these areas. NOTE: Due to the large error associated with small bases, we do not show “type of growth” results for columns where the base was less than 20. Even results for columns with bases under 100 should be viewed with caution.

Exhibit 4.14. NO TOURISM GROWTH AREAS – BIG ISLAND

	Total	Kona / Kailua Kona / S. Kona	S. Kohala / Kohala Coast / Waikoloa	North Kohala	Growth Everywhere	No More Growth Anywhere
Base	168	27	12	7	15	24
% isle total*	**100%**	**16%**	**7%**	**4%**	**9%**	**14%**
	%	%	%	%	%	%
Hotels / resorts		43				
Activities / attractions / entertainment		3				
Hiking / biking, parks / nature		N/A				
Roads / highways / infrastructure		3				
B&B / vacation rentals		7				

* Percentages add across this row to indicate the areas most frequently named (less frequent responses omitted here). Other column percentages show the specific types of desired growth most frequently mentioned for each of these areas. NOTE: Due to the large error associated with small bases, we do not show “type of growth” results for columns where the base was less than 20. Even results for columns with bases under 100 should be viewed with caution.

Exhibit 4.15. TOURISM GROWTH AREAS - KAUAI

	Total	Kokee/ Kekaha/ Waimea/ Kalaheo	Poipu / Koloa	Hanalei / Prince-ville	Kapaa	Lihue
Base **% isle total***	179 **100%**	66 **37%**	32 **18%**	14 **8%**	11 **6%**	7 **4%**
	%	%	%	%	%	%
Hotels / resorts		47	37			
Activities / attractions / entertainment		25	37			
Hiking / biking, parks / nature		6	17			
Roads / highways / infrastructure		5	N/A			
Golf Courses		1	N/A			
B&B / vacation rentals		8	3			

Exhibit 4.16. NO TOURISM GROWTH AREAS - KAUAI

	Total	Kokee/ Kekaha/ Waimea/ Kalaheo	Poipu / Koloa	Hanalei / Prince-ville	Kapaa	Lihue	No More Growth Anywhere
Base **% isle total***	179 **100%**	20 **11%**	23 **13%**	43 **24%**	36 **20%**	18 **10%**	27 **15%**
	%	%	%	%	%	%	%
Hotels / resorts		47	61	47	54		
Activities / attractions / entertainment		19	9	15	19		
Roads / highways / infrastructure		N/A	N/A	N/A	2		
Golf Courses		N/A	3	6	N/A		
B&B / vacation rentals		7	N/A	2	N/A		

* Percentages add across this row to indicate the areas most frequently named (less frequent responses omitted here). Other column percentages show the specific types of desired growth most frequently mentioned for each of these areas. NOTE: Due to the large error associated with small bases, we do not show "type of growth" results for columns where the base was less than 20. Even results for columns with bases under 100 should be viewed with caution.

Exhibit 4.17. TOURISM GROWTH AREAS - MAUI

	Total	Lahaina/ Kaanapali/ Napili/ Kapalua	Wailuku/ Kahului	Hana/ Northside/ Paia	Kihei/ Wailea	Makawao/ Upcountry
Base	188	21	17	15	13	13
% isle total*	**100%**	**11%**	**9%**	**8%**	**7%**	**7%**
	%	%	%	%	%	%
Hotels / resorts		18				
Activities / attractions / entertainment		22				
Hiking / biking, parks / nature		17				
Roads / highways / infrastructure		39				
B&B / vacation		N/A				

Exhibit 4.18. NO TOURISM GROWTH AREAS - MAUI

	Total	Lahaina/ Kaanapali/ Napili/ Kapalua	Kihei/ Wailea	Hana/ Northside/ Paia	Wailuku/ Kahului	Makawao/ Upcountry	Growth Everywhere	No More Growth Anywhere
Base	188	41	36	17	17	9	6	34
% isle total*	**100%**	**22%**	**19%**	**9%**	**9%**	**5%**	**3%**	**18%**
	%	%	%	%	%	%	%	%
Hotels / resorts		53	61					
Activities / attractions / entertainment		5	2					
Roads / highways / infrastructure		10	10					
Golf Courses		N/A	3					
Hiking / biking, parks / nature		N/A	N/A					
B&B /vacation rentals		N/A	N/A					

Survey Instruments

- **2002**
- **2001**

(Questionnaires include weighted statewide percentages for each closed-ended item.)

2002 Resident Survey

Reference No. ___________________
Time Ended ___________________
Time Started___________________
Total Minutes___________________

Date:__________
Interviewer Name____ **Interviewer ID**___________________
Respondent Name____ **Telephone**____________________________

Hello, good morning/afternoon/evening, I'm _____________ from Market Trends Pacific, a professional survey research center in Hawaii. Today we're conducting a short survey on residents' attitudes on public issues in Hawaii. Let me assure you this survey is to get your opinions only, and we're not selling anything. Let me also assure you that all of your answers will be kept completely confidential.

A. Are you a full-time Hawaii resident who is 18 years of age or older?

YES ← CONTINUE
NO ← TERMINATE

1. I am going to read you a list of possible community problems. For each one, please tell me if you think it is a problem or not a problem in your community. Let us begin with [READ FIRST ITEM – RANDOM START]. Would you say that it is a big problem, a small problem or not a problem at all in your community?

		Big Problem	Small Problem	Not a Problem	Expressed Opposite View	Ref./ Don't Know
a.	availability of jobs	51%	23%	19%	0%	7%
b.	cost of food and clothing	46%	28%	25%	0%	1%
c.	cost of housing	70%	16%	11%	0%	3%
d.	number and quality of parks	15%	25%	58%	0%	2%
e.	preservation of native Hawaiian culture	27%	26%	39%	1%	8%
f.	population growing too fast	44%	24%	28%	0%	3%
g.	traffic	73%	15%	12%	0%	0%
h.	average income for residents	50%	22%	17%	1%	10%
i.	crime	41%	34%	24%	0%	1%
j.	loss of nature and open space	31%	28%	38%	0%	3%
k.	economy not diversified enough	52%	22%	21%	0%	5%
l.	air or water pollution	24%	30%	44%	0%	2%
m.	social problems between people with different backgrounds	15%	33%	49%	0%	2%
n.	not enough nearby stores, restaurants, or entertainment	11%	17%	72%	1%	0%

2/3. *[NOTE: A draft version of this survey had some additional questions – numbered 2 and 3 – which were eventually deleted for reasons of length. Because the survey had already been programmed on Market Trends Pacific's CATI system, the original question numbers were preserved. So "Question 4" below was in reality Question 2, but we preserve the original numbering for consistency with computerized output.*

4. Which of the following statements comes closest to your own feelings about tourism growth in Hawaii? [READ 1ST 3 STATEMENTS – ROTATE:]

	Unless we are sure some other major industry will work here, we must support more tourism growth	40%
	We should not support any more tourism growth, even if that means the economy will stay the same or get worse	7%
	We should support more tourism growth in the short term, but we have to accept long-term limits even if we can't find other major industries that will work here	48%
______________________ ______________________	[Other explicit tourism growth philosophy; SPECIFY]	2%
	[Don't know; no answer]	3%

5. Please tell me if you would favor or oppose government doing each of the following. [READ – RANDOM START]

[IF "FAVOR":] Do you strongly favor government doing this, or just tend to favor it? [IF "OPPOSE':] Do you strongly oppose government doing this, or just sort of tend to oppose it?

		strongly favor	tend to favor	tend to oppose	strongly oppose	mixed/refus./ don't know
a.	budget more money to improve infrastructure such as streets, drainage and landscaping in tourist areas	44%	22%	12%	16%	6%
b.	budget more money to restore and sustain our parks, marine reserves and other scenic attractions for residents and visitors	52%	24%	8%	9%	7%
c.	budget more money to create new parks, marine preserves, and other scenic attractions for tourists and residents	38%	21%	16%	18%	7%

6. How close do you live to the nearest really large resort area or tourist attraction – right in one, within a five-minute drive, or farther?

right in one …………………8% ► GO TO Q. 9
within 5-minute drive …… 33%
farther ……………………..58%
close to a planned new big tourist area ………… 1%
don't know/no response …. 0%

7/8. Are any of the following smaller tourist activities within a five-minute drive of your house? [ROTATE. IF "YES" TO ANY ITEM, ASK FOLLOW-UP Q8:] Has this tourism activity made your area more pleasant or less pleasant to live in?

		Question 7			[IF YES:] Question 8				
		Yes	No	Don't Know	More Pleasant	Less Pleasant	Mixed	No Effect	DK
a.	Shops or restaurants aimed mostly at tourists	38%	61%	1%	38%	7%	15%	36%	3%
b.	Vacation rental houses or bed-and-breakfast	25%	71%	5%	30%	10%	9%	48%	3%
c.	Luaus or shows mostly for visitors	18%	81%	1%	41%	6%	12%	37%	3%
d.	Scenic attractions or overlooks designed for tourists	37%	62%	1%	44%	8%	6%	40%	2%
e.	Historic sites attracting many visitors	33%	66%	2%	43%	7%	11%	38%	1%
f.	Public outdoor areas – like beach parks or hiking trails – that now attract lots of tourists	41%	58%	1%	47%	11%	8%	29%	5%
g.	Very small independent hotels or clusters of vacation cottages	18%	79%	2%	38%	12%	12%	36%	2%

9. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	Even if more visitors come, I don't want to see any more hotels on this island.	43%	15%	18%	18%	6%
b.	Much tax money from tourism should go to public improvements in visitor areas.	40%	26%	14%	16%	5%
c.	We need more tourism jobs on this island.	35%	23%	15%	21%	6%
d.	We should keep all future resorts close to existing hotels.	40%	24%	12%	14%	10%
e.	We should give tax incentives for renovating or building new hotels.	24%	14%	14%	38%	9%
f.	We should encourage visitors to spend more time and money throughout the island, not just in so-called "tourist areas."	71%	18%	3%	4%	3%
g.	Much of the tax money from tourism should go to clean up the environment.	54%	25%	8%	8%	5%
h.	We should encourage more visitor activity in wilderness areas.	34%	19%	15%	27%	6%
i.	We should encourage more visitor activities in museums and historical sites.	63%	24%	5%	4%	4%

[ASK Q10 ONLY IF RESPONDENT "AGREED" ON BOTH Q9a AND Q9c:]

10. I notice you said we need more tourism jobs, but you don't want to see any more hotels on the island. Many people have told us this, so we want to ask – Do you have any ideas how we can create new tourism jobs without building any more hotels? [RECORD ANSWERS VERBATIM.]

*** Survey answers found in report**

11. Please tell me whether you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	This island is being run for tourists at the expense of local people	27%	21%	20%	24%	8%
b.	Overall, tourism has brought more benefits than problems to this island.	52%	25%	7%	8%	9%
c.	My island's economy is too dependent on tourism.	66%	19%	6%	6%	3%
d.	Hotels often don't make much of a profit in Hawaii these days.	22%	15%	13%	23%	27%
e.	Having new bed and breakfasts or vacation rental houses in residential areas would be good for Hawaii.	23%	22%	14%	28%	13%
f.	Very little of the profits from tourism stay here in Hawaii.	24%	20%	12%	13%	32%
g.	The visitor industry does a good job in giving back to the community.	24%	25%	14%	17%	20%

12. We'd like to know how you think tourism affects things on your island. For each thing I mention, tell me if you feel tourism makes it better or worse these days. Does tourism make [READ FIRST ITEM – ROTATE] better or worse?

		Better	Worse	No Effect	DK/NA
a.	number of jobs	80%	7%	7%	6%
b.	cost of food and clothing	24%	33%	33%	11%
c.	cost of housing	15%	35%	38%	13%
d.	number and quality of parks	41%	12%	38%	9%
e.	preservation of native Hawaiian culture	46%	19%	24%	11%
f.	number of people living in your part of the island	25%	14%	51%	9%
g.	traffic	7%	54%	36%	3%
h.	average income for residents	53%	15%	20%	11%
i.	crime	8%	41%	40%	11%
j.	preservation of nature and open space	32%	25%	34%	10%
k.	diversity of economic activities	45%	20%	24%	11%
l.	quality of water and air	16%	31%	44%	10%
m.	relations between people with different backgrounds	47%	11%	33%	9%
n.	shopping, restaurants, and entertainment opportunities for residents	70%	8%	18%	5%
o.	overall standard of living	67%	9%	17%	7%
p.	overall quality of life	66%	9%	17%	8%

13. What about you personally? Overall, has tourism been mostly good or mostly bad for you and your family?

good for self and family 50%
bad for self and family 3%
some good, some bad 10%
no effect at all 33%
don't know/no response 3%

GO TO Q16

14. In what ways has tourism been particularly good for you and your family? [RECORD ANSWERS VERBATIM]

*** Survey answers found in report**

15. And in what ways has tourism been particularly bad for you and your family? [RECORD ANSWERS VERBATIM]

*** Survey answers found in report**

[ASK Q16 ONLY IF RESPONDENT SAID “WORSE” ON Q12c:]

16. A little while ago, you said you thought tourism makes housing costs worse on this island. How do you believe tourism makes housing costs worse?

*** Survey answers found in report**

17. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE – but always ask 18h last]

		strongly agree	somewhat agree	somewhat disagree	strongly disagee	DK
a.	Most visitor industry jobs pay pretty well.	21%	25%	16%	19%	20%
b.	Most tourism jobs don’t have much opportunity for advancement.	30%	22%	16%	14%	18%
c.	There’s a wide variety of jobs in Hawaii’s visitor industry.	49%	27%	7%	8%	10%
d.	The best tourism jobs go to outsiders a lot more often than to local people	31%	18%	17%	15%	19%
e.	Tourism workers often have poor hours or work only part of the year	23%	24%	15%	16%	22%
f.	These days, most visitor industry managers are people who grew up in Hawaii	15%	21%	15%	23%	26%
g.	It’s as easy to find pride and dignity in tourism work as any other sort of job	51%	23%	5%	10%	11%
h.	When I think about “visitor industry jobs,” I’m really mostly thinking just about hotel jobs.	26%	20%	20%	28%	7%

18. I’m going to read a list of places on this island. For each one, please tell me if you have any really strong feeling that this place either should or should not have significantly more tourism activity. If you don’t have any strong feelings one way or the other, just say that. How about [READ FIRST ITEM – ROTATE] – do you strongly feel this should have more tourism activity, strongly feel it should not, or no strong feelings?

		strongly should	strongly should not	no strong feeling	mixed/ “depends”	DK
a.	Place 1	1	2	3	4	9
b.	Place 2	1	2	3	4	9
c.	Place 3	1	2	3	4	9
d.	Place 4	1	2	3	4	9
e.	Place 5	1	2	3	4	9
f.	Place 6	1	2	3	4	9
g.	Place 7	1	2	3	4	9

[**NOTE: Lists of places varied by county. See report for geographical areas used for each county.]

19. Including yourself, how many people live in this household?

1=12% 2=29% 3=17% 4=19% 5+=22% DK/No Resp.=1% **[Avg. No. = 3.33]**

20. How many of these are adults aged 18 or over?

1=5% 2=50% 3+=29% DK/No Resp.=16% **[Avg. No. = 2.62]**

21. Including yourself, how many of the adults in your household are employed?

0=15% 1=25% 2=40% 3+=17 DK/No Resp.=3% **[Avg. No. = 1.78]**

22. Including yourself, how many of the adults in your household are unemployed and actively looking for work?

0=87% 1=7% 2=2% 3+=1% DK/No Resp.=4% **[Avg. No. = 0.13]**

[READ:] Let's define the "visitor industry" as any business depending mostly on tourists or depending on other businesses working with tourists. [IF ANSWER TO Q. 21 WAS ZERO, GO TO Q. 28; OTHERWISE READ Q. 23.]

23. Including yourself, how many adults in your household now work in the visitor industry? [IF ZERO, GO TO Q. 25]

0=66% 1=23% 2+=10% DK/No Resp=1% **[Avg. No. = 0.50]**
[Avg. Excluding 0's = 1.49]

24. Including yourself, how many of these visitor industry workers belong to a labor union?

0=67% 1=22% 2+=7% DK/No Resp=4% **[Avg. No. = 0.44]**

25. Do you personally work for the government or for a private business?

government	20%
private business	61%
other/nonprofit	6%
not employed → GO TO Q. 28	10%
don't know/no response	2%

26. How much would you say your job depends on the strength of the visitor industry – would you say it depends [READ:]

greatly	23%
somewhat	17%
a little	14%
not at all	43%
(don't know/no response)	2%

27. *[IF Q23 ANSWER WAS "ZERO," MARK "NO" BELOW — DO NOT READ QUESTION. OTHERWISE, READ:]*
[Note: Due to an error in skip instructions, results for Q27 could not be used this year.]
Would you say your job is actually part of the visitor industry? [IF RESPONDENT HAS SEVERAL JOBS, MARK "YES" IF ANY IN TOURISM.]

yes	*4%*
no	*96%*
don't know/no response)	*1%*

28. Have you ever held a job in the visitor industry in Hawaii?

yes	37%
no	62%
don't know/no response	1%

29. Some people get income from <u>outside</u> Hawaii — stock dividends, work outside Hawaii, retirement income earned mostly from jobs outside Hawaii, and so forth. Roughly how much of your household income do you think comes from <u>outside</u> Hawaii? [READ:]

just about none	57%
some, but less than a fourth	13%
at least a fourth, but less than half	7%
at least half, but less than three-fourths ...	4%
at least three-fourths, but not all	3%
just about all of it	9%
[don't know; refused]	8%

30. In which age category are you?

Under 25	11%
25 to 34	18%
35 to 44	23%
45 to 54	18%
55 to 64	14%
65 or older	15%
[Refused]	2%

31. What is your ethnic identification? [IF MORE THAN ONE:] With which do you identify the most?

Caucasian	30%
Filipino	12%
Hawaiian or part-Hawaiian	19%
Japanese	17%
Mixed, non-Hawaiian	7%
Other (specify:) _______________	13%
[Refused]	2%

32. Which of the following categories includes your total annual family income before taxes for 2001? Just stop me when I reach the correct category.

Less than $15,000	4%
$15,000 but less than $25,000	8%
$25,000 but less than $35,000	17%
$35,000 but less than $50,000	15%
$50,000 but less than $75,000	20%
$75,000 but less than $100,000	9%
$100,000 and over	8%
[Refused]	19%

33. Gender [RECORD, DO NOT ASK]

Male	44%
Female	56%

34. Island [RECORD, DO NOT ASK]

Oahu..	1
Maui..	2
Moloka`i …………………………………..	3
Lana`i ……………………………………..	4
Kauai..	5
Big Island...	6

In case my supervisor would like to verify this survey, may I have just your first name please? [RECORD RESPONDENT NAME ON COVER.] And that was my last question. Thank you very much for your time and cooperation in completing this survey!

2001 HTA Resident Survey
(Final_72601_1264)

Reference No. ___________________

Time Ended _________________________
Time Started___________________
Total Minutes___________________

Date:__________
Interviewer Name____ **Interviewer ID**___________________
Respondent Name_______________________________________ **Telephone**___________________________

Hello, good morning/afternoon/evening, I'm _____________ from Market Trends Pacific, a professional survey research center in Hawaii. Today we're conducting a short survey on residents' attitudes on public issues in Hawaii. Let me assure you this survey is to get your opinions only, and we're not selling anything. Let me also assure you that all of your answers will be kept completely confidential.

A. Are you a full-time Hawaii resident who is 18 years of age or older?
YES ← CONTINUE
NO ← TERMINATE

1. I am going to read you a list of possible community concerns/problems. For each one, please tell me if you think it is a concern or not a concern in your community. Let us begin with [READ FIRST ITEM – RANDOM START]. Would you say that it is a big concern/issue, a small concern/issue or not a concern/issue at all in your community?

		Big Problem	Small Problem	Not a Problem	Expressed Opposite View	Ref./ Don't Know
a.	availability of jobs	50%	27%	17%	0%	7%
b.	cost of food and clothing	52%	30%	18%	0%	1%
c.	cost of housing	64%	20%	14%	0%	2%
d.	number and quality of parks	20%	32%	46%	0%	1%
e.	preservation of native Hawaiian culture	33%	33%	28%	0%	6%
f.	population growing too fast	41%	30%	27%	0%	2%
g.	traffic	66%	22%	12%	0%	0%
h.	crime	39%	43%	16%	0%	1%
i.	loss of nature and open space	37%	30%	31%	0%	2%
j.	economy not diversified enough	50%	25%	20%	0%	5%
k.	air or water pollution	26%	35%	38%	0%	1%
l.	social problems between people with different backgrounds	18%	39%	41%	0%	1%
m.	not enough nearby stores, restaurants, or entertainment	12%	25%	64%	0%	0%
n.	not enough cultural activities such as art, theatre, etc.	21%	36%	40%	0%	3%

2. Recently, fewer visitors have been coming to Hawaii. On the whole, would you say this makes you feel very happy, somewhat happy, somewhat unhappy, or very unhappy? [INTERVIEWER; IF RESPONDENT SAYS, "UNSURE," PROBE TO SEE IF THIS MEANS MIXED HAPPY AND UNHAPPY FEELINGS, OR DON'T KNOW/NO FEELINGS.]

	Very Happy	5%
	Somewhat Happy	13%
GO TO Q3	Somewhat Unhappy	42%
	Very Unhappy	19%
	Mixed Feelings	9%
GO TO Q3	Don't Know/No Feelings	12%

2A. Why do you feel happy fewer visitors are coming now? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

3. Do you agree or disagree that people on this island have as much Aloha Spirit for visitors as they did ten or twenty years ago? [IF AGREE OR DIS-AGREE:] Do you strongly (agree/disagree) or somewhat (agree/disagree)?

Strongly Agree	18%
Somewhat Agree	24%
Somewhat Disagree	26%
Strongly Disagree	21%
Don't Know/No Answer	11%

3A. Why do you think people here do not have as much Aloha Spirit for visitors today? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

4. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of these statements. [ROTATE]

			Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	Visitors usually treat local people with respect and equality	31%	39%	17%	6%	7%	
b.	I generally feel welcome and comfortable in hotel areas	48%	30%	10%	7%	5%	
c.	Tour buses and tourists in rental cars can be a real irritation on the road		23%	25%	29%	21%	2%
d.	I usually enjoy getting to meet and talk with visitors		52%	30%	6%	6%	6%
e.	I really can't get very mad at poor local kids who steal from tourists		6%	4%	8%	79%	3%
f.	There are too many tourists on this island now		12%	15%	33%	35%	4%
g.	The average tourist probably is no richer than I am		30%	33%	17%	14%	6%
h.	This island is being run for tourists at the expense of local people		24%	24%	25%	22%	5%

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
i.	I would like to have residential "Bed and Breakfasts/Farm Stays in my community	22%	29%	16%	24%	8%

(INTERVIEWER: READ DEFINITION OF BED AND BREAKFASTS TO RESPONDENT. "A LODGING FACILITY WITH A LIMITED NUMBER OF GUEST ROOMS, WHICH INCLUDE BREAKFAST IN THE DAILY RENTAL RATE. TYPICAL B&B FACILITIES ARE EITHER SMALL INNS OR FAMILY HOMES. A FARM STAY IS RENTAL OF A ROOM ON A FARM, AGRICULTURAL LAND OR RANCH.)

j.	I generally feel that having vacation rentals in my community is not a problem	36%	34%	12%	13%	6%

(INTERVIEWER: READ DEFINITION OF VACATION RENTALS TO RESPONDENT. AN INDIVIDUAL CONDOMINIUM UNIT – NOT A HOTEL RENTAL OPERATION – HOUSE, CABIN, VILLA OR COTTAGE WITH VERY LIMITED SERVICE, OFTEN ONLY BASIC CLEANING SUPPLIES PROVIDED".)

5. Please tell me if you would favor or oppose government doing each of the following. [READ – RANDOM START]

   [IF "FAVOR":] Do you strongly favor government doing this, or just tend to favor it? [IF "OPPOSE':] Do you strongly oppose government doing this, or just sort of tend to oppose it?

		strongly favor	tend to favor	tend to oppose	strongly oppose	mixed/refus./ don't know
a.	budget more money to improve infrastructure such as streets, drainage and landscaping in tourist areas	36%	25%	16%	18%	6%
b.	budget more money to restore and sustain our parks, marine reserves and other scenic attractions for residents and visitors	62%	23%	5%	4%	5%
c.	budget more money to create new parks, marine preserves, and other scenic attractions for tourists and residents	44%	23%	13%	13%	6%
d.	passing legislation authorizing the legalization of Bed and Breakfasts in more areas	20%	29%	15%	24%	13%

6. Which of the following statements comes closest to your own feelings about tourism growth in Hawaii? [READ 1ST 3 STATEMENTS – ROTATE:]

Unless we are sure some other major industry will work here, we must support more tourism growth	34%
We should not support any more tourism growth, even if that means the economy will stay the same or get worse	7%
We should support more tourism growth in the short term, but we have to accept long-term limits even if we can't find other major industries that will work here	45%
[Other explicit tourism growth philosophy; SPECIFY]	4%
[Don't know; no answer]	9%

7. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	Even if more visitors come, I don't want to see any more hotels on this island.	47%	23%	16%	10%	3%
b.	Much tax money from tourism should go to public improvements in visitor areas.	39%	31%	13%	14%	2%
c.	We need more tourism jobs on this island.	28%	24%	23%	19%	6%
d.	We should keep all future resorts close to existing hotels.	35%	27%	19%	13%	6%
e.	We should give tax incentives for renovating or building new hotels.	14%	20%	22%	40%	3%
f.	We should encourage visitors to spend more time and money throughout the island, not just in so-called "tourist areas."	62%	25%	6%	4%	2%
g.	Much of the tax money from tourism should go to clean up the environment.	52%	31%	9%	4%	3%
h.	We should encourage more visitor activity in wilderness areas.	26%	27%	18%	24%	4%
i.	We should encourage more visitor activities in museums and historical sites.	57%	29%	6%	4%	3%

8. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	Tourism is mostly controlled by Caucasians and business people from Japan.	34%	28%	15%	10%	14%
b.	Overall, tourism has brought more benefits than problems to this island.	37%	36%	14%	8%	6%
c.	I'm proud of how my island's hotel areas & tourism attractions look to visitors	38%	38%	13%	8%	3%
d.	My island's economy is too dependent on tourism.	54%	28%	10%	5%	3%
e.	Hotels often don't make much of a profit in Hawaii these days.	10%	18%	18%	23%	30%
f.	Very little of the profits from tourism stay here in Hawaii.	16%	25%	18%	12%	29%
g.	The visitor industry does a good job in giving back to the community.	15%	29%	21%	18%	17%
h.	Most of tourism marketing is paid for by residents' tax money.	24%	25%	13%	8%	30%
i.	Tourism in Hawaii consists as much or more of small businesses as big business.	27%	31%	17%	14%	11%
j.	Visitors to Hawaii often are charged too much money for what they get.	31%	25%	19%	13%	11%
k.	The cruise ship industry is good for					

Hawaii's visitor industry.	15%	22%	28%	35%	0%

9. We'd like to know how you think tourism affects things on your island. For each thing I mention, tell me if you feel tourism makes it better or worse these days. Does tourism make [READ FIRST ITEM – ROTATE] better or worse?

		Better	Worse	No Effect	DK/NA
a.	number of jobs	73%	14%	9%	4%
b.	cost of food and clothing	21%	41%	31%	8%
c.	cost of housing	11%	48%	30%	12%
d.	number and quality of parks	44%	14%	35%	7%
e.	preservation of native Hawaiian culture	40%	29%	22%	9%
f.	number of people living in your part of the island	24%	23%	47%	7%
g.	traffic	3%	78%	16%	3%
h.	crime	7%	63%	22%	8%
i.	preservation of nature and open space	27%	42%	22%	8%
j.	diversity of economic activities	52%	20%	18%	11%
k.	quality of water and air	17%	43%	34%	7%
l.	relations between people with different backgrounds	53%	15%	23%	9%
m.	shopping, restaurants, and entertainment opportunities for residents	67%	15%	14%	4%
n.	overall standard of living	55%	21%	16%	7%
o.	overall quality of life	59%	14%	22%	6%

10. What about you personally? Overall, has tourism been mostly good or mostly bad for you and your family?

good for self and family 56%
bad for self and family 6%
some good, some bad 8%
no effect at all ....29% → GO TO Q13
don't know/no response .... 1% → GO TO Q13

11. In what ways has tourism been particularly <u>good</u> for you and your family? [RECORD ANSWERS VERBATIM]

*** Statistical results found in report**

12. And in what ways has tourism been particularly <u>bad</u> for you and your family? [RECORD ANSWERS VERBATIM]

*** Statistical results found in report**

13. Let's assume the overall number of visitors to Hawaii stays pretty much the same over the next ten years – doesn't go much up or down. If that happens, do you think our economy will probably get even worse over the next ten years, probably stay much the same as now, or that something will probably happen to make it get better?

[IF "NOT SURE:"] Are you not sure about any of the three possibilities, or do you think one is very unlikely and you're just not sure which of the other two will probably happen?

ASK Q13A	Worse……………………………………	38%
	Same ……………………………………	32%
ASK Q13B	Better ……………………………………	20%
ASK Q13C	Not sure if worse or same ……………	0%
ASK Q13C	Not sure if same or better ……………	0%
ASK Q13C	Not sure if worse or better ……………	0%
	Not sure at all/refused …………………	11%

13A. Why do you think the economy would get even worse if the number of visitors stays the same? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

13B. What do you think would happen to make the economy get better if the number of visitors stays the same? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

13C. What do you think will determine whether the economy (gets worse or stays the same)/(stays the same or gets better)/(gets worse or better) if the number of visitors stays the same? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

14. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
14a. If I had a child going into college, I'd encourage the child to study visitor industry management	17%	23%	21%	30%	10%
14b. If I had a child with a high school degree only who wanted to start work in Hawaii, I'd encourage the child to get a job in tourism	25%	28%	17%	24%	6%

15a. [ASK ONLY IF DISAGREE TO Q14a:] Why wouldn't you encourage a child going to college to study visitor industry management? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

15b. [ASK ONLY IF DISAGREE TO Q14b:] Why wouldn't you encourage a child with a high school degree to take a job in tourism here? [RECORD ANSWERS VERBATIM.]

*** Statistical results found in report**

16. Please tell me if you agree or disagree with each of these statements. [IF AGREE OR DISAGREE:] Would you strongly (agree/disagree) or somewhat (agree/disagree?) [ROTATE]

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	DK/NA
a.	Most visitor industry jobs pay pretty well.	13%	26%	20%	20%	21%
b.	Most tourism jobs don't have much opportunity for advancement.	28%	29%	18%	12%	14%
c.	There's a wide variety of jobs in Hawaii's visitor industry.	35%	32%	14%	10%	10%
d.	The best tourism jobs go to outsiders a lot more often than to local people	25%	24%	22%	13%	17%
e.	Tourism workers often have poor hours or work only part of the year	21%	26%	19%	14%	19%
f.	These days, most visitor industry managers are people who grew up in Hawaii	9%	23%	22%	20%	25%
g.	It's as easy to find pride and dignity in tourism work as any other sort of job	40%	34%	10%	9%	6%

17. When thinking of all the areas on your island, which areas could stand and accept more growth to accommodate visitors? And by growth to accommodate visitors, I mean accommodations, activities, attractions, etc. Where else? (INTERVIEWER: PROBE FOR ALL AREAS)

    *** Statistical results found in report**

18. (FOR EACH ANSWER IN Q17, ASK:) You mentioned (area). Please describe the growth you are thinking about for (area). (INTERVIEWER: PROBE FOR SPECIFIC AREAS)

    *** Statistical results found in report**

19. Now, in which areas of your island, should there be NO more growth to accommodate visitors? And by NO growth to accommodate visitors, I mean in accommodations, activities, attractions, etc. Where else? (INTERVIEWER: PROBE FOR ALL AREAS)

    *** Statistical results found in report**

20. (FOR EACH ANSWER IN Q19, ASK:) You mentioned (area). Please describe the NO growth you are thinking about for (area). (INTERVIEWER: PROBE FOR SPECIFIC AREAS)

    *** Statistical results found in report**

21. In the past 12 months, how many times have you stayed overnight at a resort hotel or condo in Hawaii?

None	48%
Once	18%
Twice	13%
Three or More Times	21%
Don't Know/Refused	1%

22. And in the past 12 months, how many times have you gone on a vacation outside Hawaii?

None	40%
Once	25%
Twice	19%
Three or More Times	16%
Don't Know/Refused	0%

23. Including yourself, how many people in your household are employed [IF ZERO, GO TO Q. 28A]

Overall Average No.: 1.87

24. Including yourself, how many of these work in the visitor industry? [IF ZERO, GO TO Q. 26]

Overall Average No.: 0.48
Avg. Excluding 0's: 1.42

25. Including yourself, how many of these visitor industry workers belong to a labor union?

Overall Average No.: 0.38

26. Do you personally work for the government or for a private business?

government	21%
private business	57%
other/nonprofit	9%
not employed → GO TO Q. 28A	14%
don't know/no response	0%

27. How much would you say your job depends on the strength of the visitor industry – would you say it depends [READ:]

greatly	23%
somewhat	23%
a little	15%
not at all	38%
(don't know/no response)	1%

28. [IF Q24 ANSWER WAS "ZERO," MARK "NO" BELOW — DO NOT READ QUESTION. OTHERWISE, READ:]
Would you say your job is actually part of the visitor industry? [IF RESPONDENT HAS SEVERAL JOBS, MARK "YES" IF ANY IN TOURISM.]

yes	20%
no → 28a	80%
don't know/no response) → 28a	0%

28a. Have you ever held a job in the visitor industry in Hawaii?

yes	39%
no	61%
don't know/no response	0%

29. Some people get income from <u>outside</u> Hawaii — Social Security or other federal assistance; federal jobs; stock dividends; and so forth. Roughly how much of your immediate family income do you think comes from <u>outside</u> Hawaii? [READ:]

just about none	50%
some, but less than a fourth	11%
at least a fourth, but less than half	12%
at least half, but less than three-fourths	6%
at least three-fourths, but not all	3%
just about all of it	9%
[don't know; refused]	8%

30. In which age category are you?

Under 25	13%
25 to 34	19%
35 to 44	19%
45 to 54	19%
55 to 64	15%
65 or older	15%
[Refused]	1%

31.	What is your ethnic identification? [IF MORE THAN ONE:] With which do you identify the most?	Caucasian	26%
		Filipino	11%
		Hawaiian or part-Hawaiian	20%
		Japanese	17%
		Mixed, non-Hawaiian	18%
		Other (specify:) _______________	6%
		[Refused]	2%
32.	Which of the following categories includes your total annual family income before taxes for 2000? Just stop me when I reach the correct category.	Less than $15,000	6%
		$15,000 but less than $25,000	10%
		$25,000 but less than $35,000	12%
		$35,000 but less than $50,000	18%
		$50,000 but less than $75,000	15%
		$75,000 but less than $100,000	10%
		$100,000 and over	9%
		[Refused]	21%
33.	Gender [RECORD, DO NOT ASK]	Male	46%
		Female	54%
34.	Island [RECORD, DO NOT ASK]	Oahu	12%
		Maui	5%
		Kauai	11%
		Big Island	72%

In case my supervisor would like to verify this survey, may I have just your first name please? [RECORD RESPONDENT NAME ON COVER.] And that was my last question. Thank you very much for your time and cooperation in completing this survey!